



Arizona Tourism in 2011
Arizona Governor's Conference on Tourism
July 12, 2012

Total Overnight Visitation to Arizona

2

<u>2010</u>	<u>2011</u>	<u>11/10 %</u> <u>Change</u>
36.5 million	37.6 million	2.9%

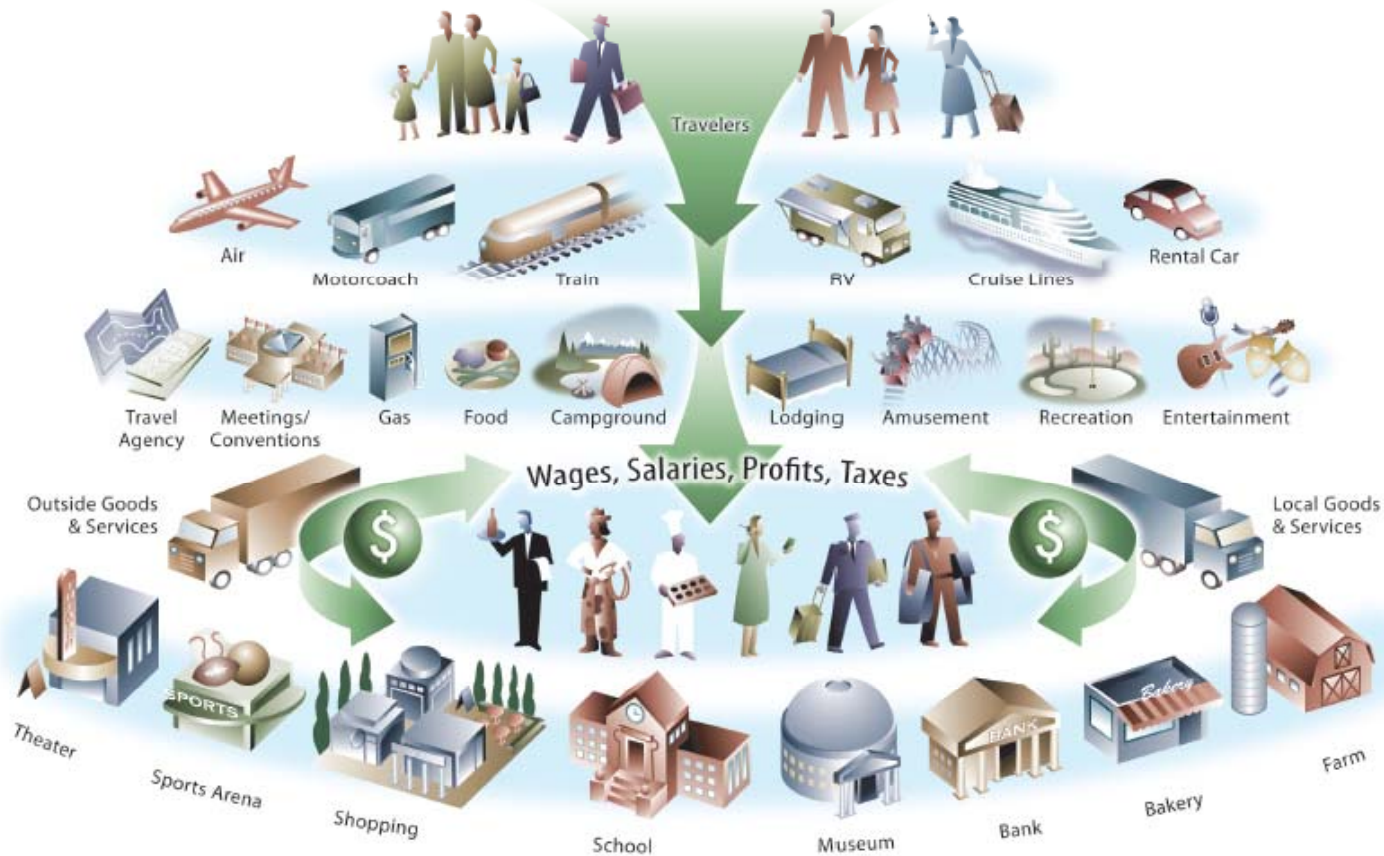
Source: Tourism Economics, 2007-08 Mexican Visitors to Arizona, US Department of Commerce-Office of Travel & Tourism Industries and Statistics Canada



Economic Impact

The Power of Travel

How Travel Dollars Support America

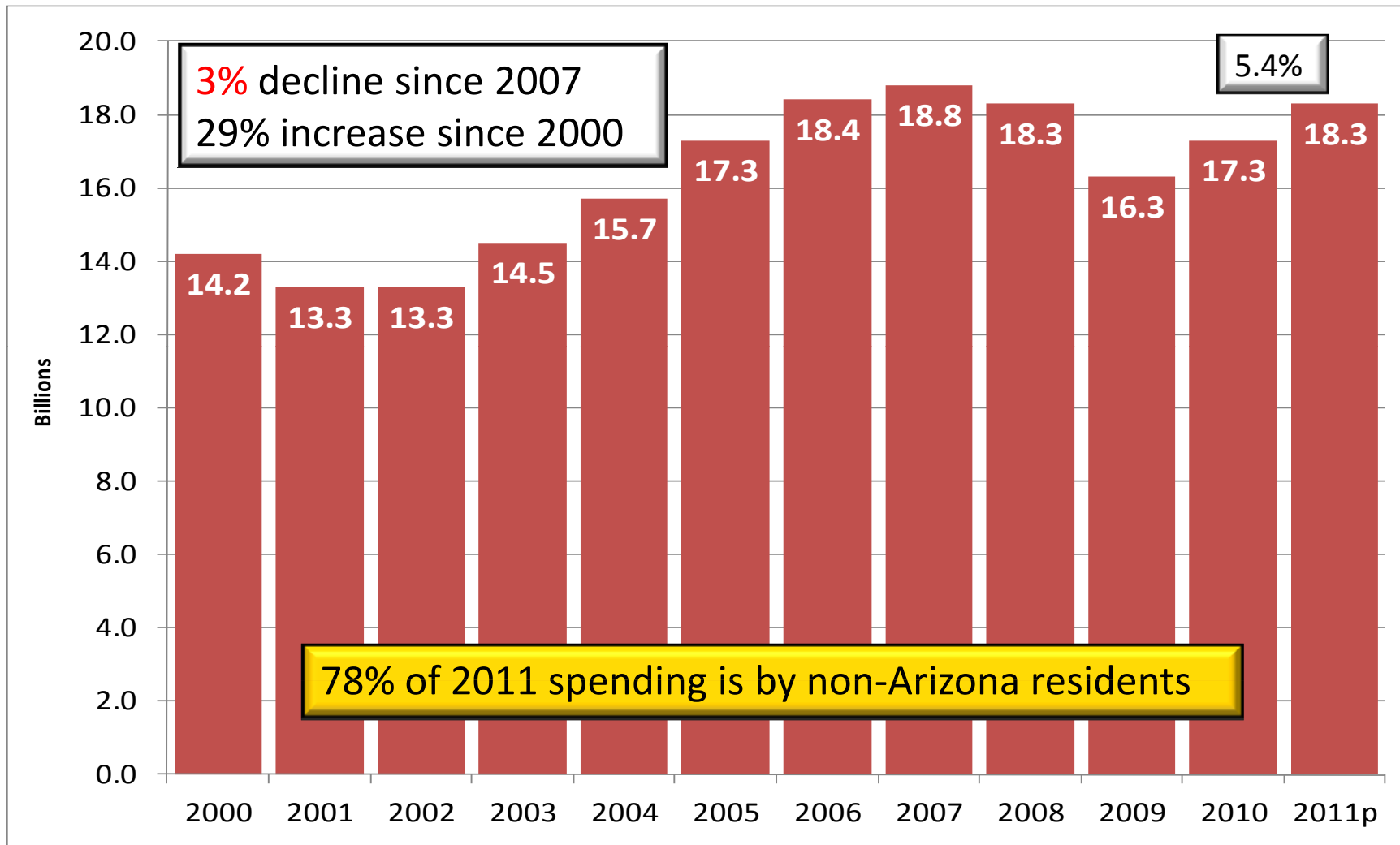


Direct spending of \$18.3 billion generated:

- 157,700 direct jobs
- \$5.1 billion direct earnings
- \$2.7 billion in local, state and federal tax revenues

2011 Direct Travel Spending in Arizona (dollars) *historical comparison from 2000*

6

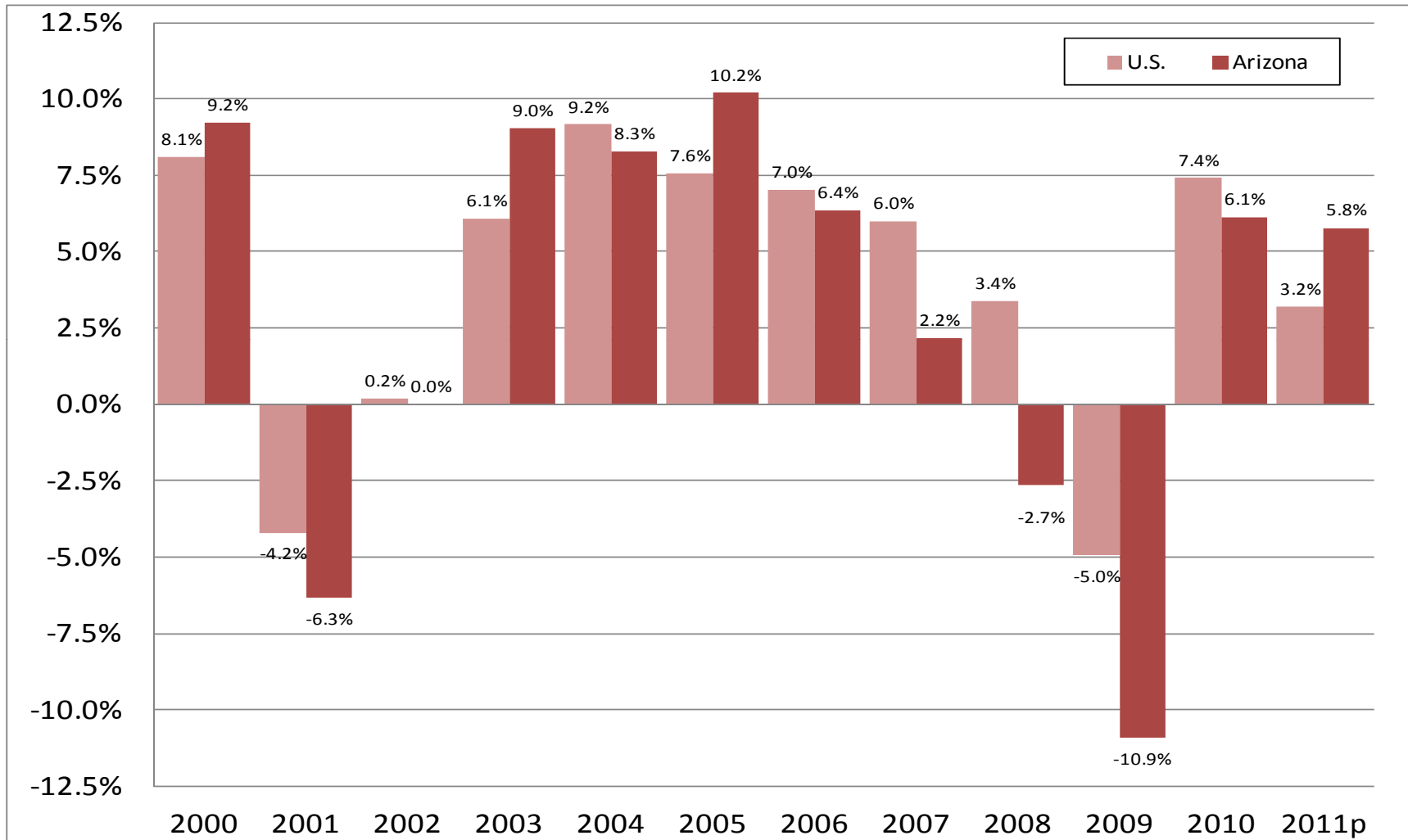


Source: Dean Runyan Associates

2011 Direct Travel Spending – U.S. vs. Arizona (dollars)

historical comparison from 2000

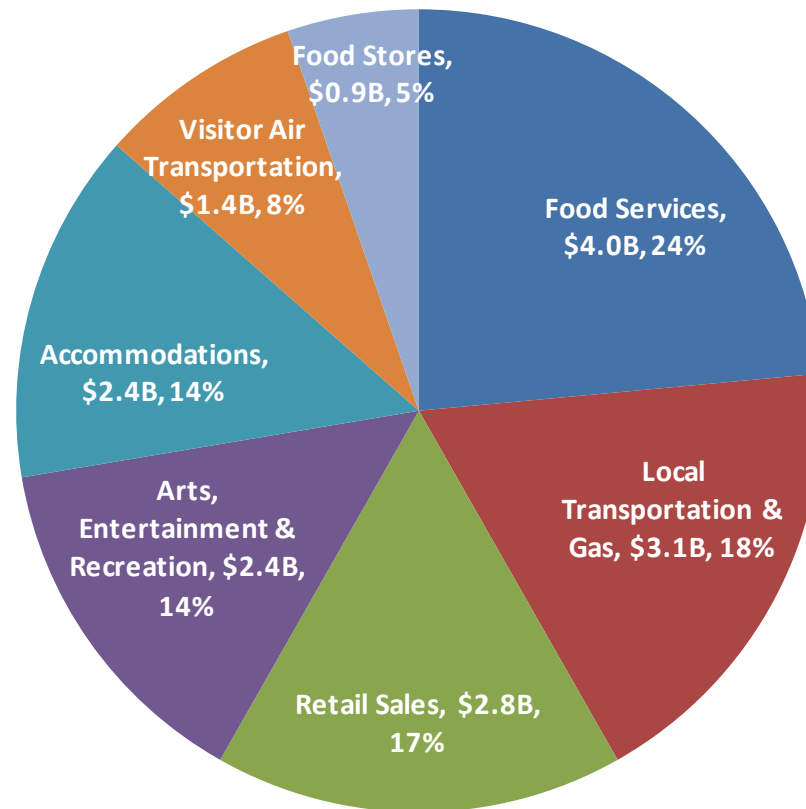
7



Source: Dean Runyan Associates



2011 Visitor Spending by Commodity Purchase (\$billion)

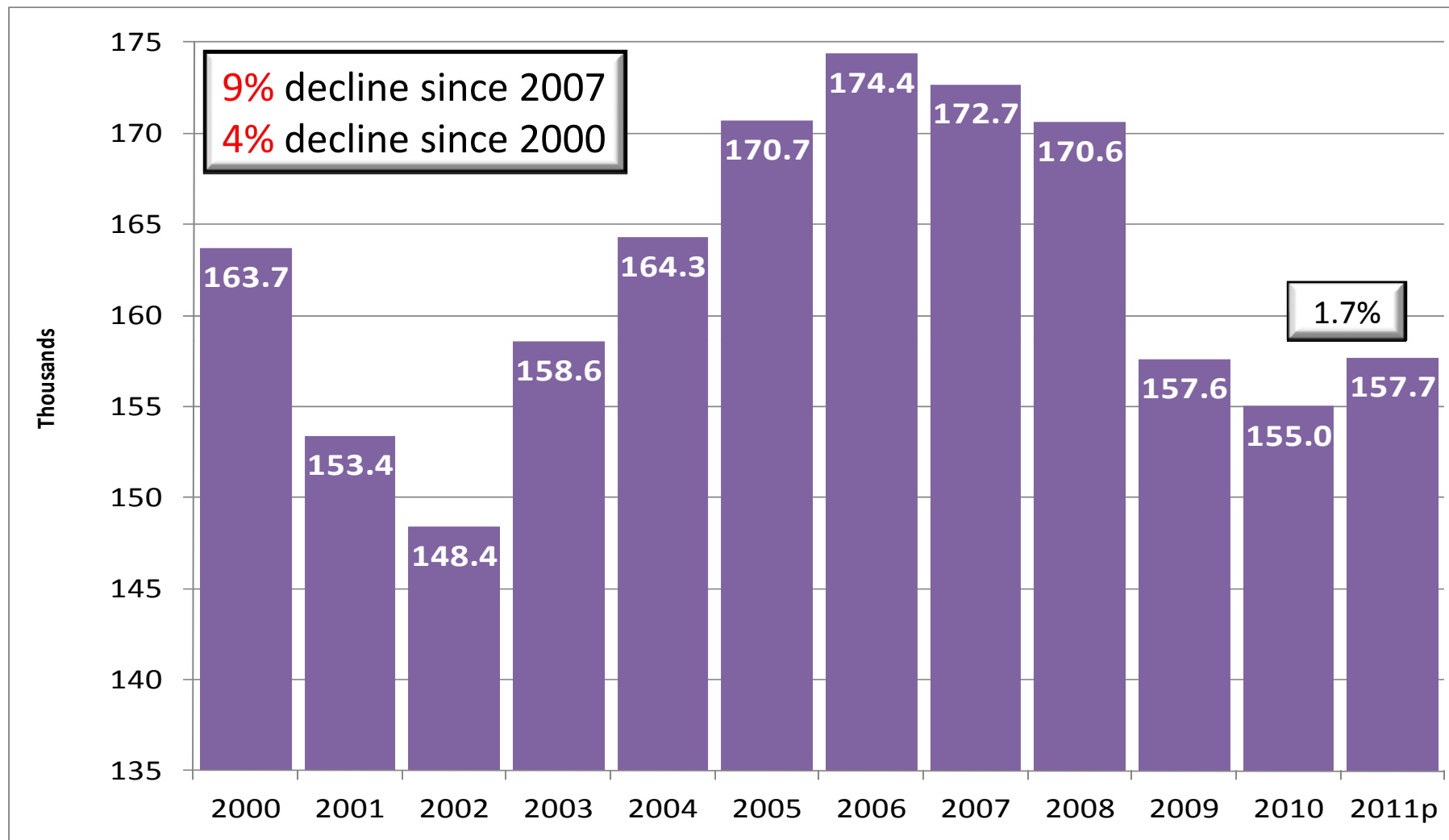


Source: Dean Runyan Associates

Direct Travel Employment in Arizona

historical comparison through 2000

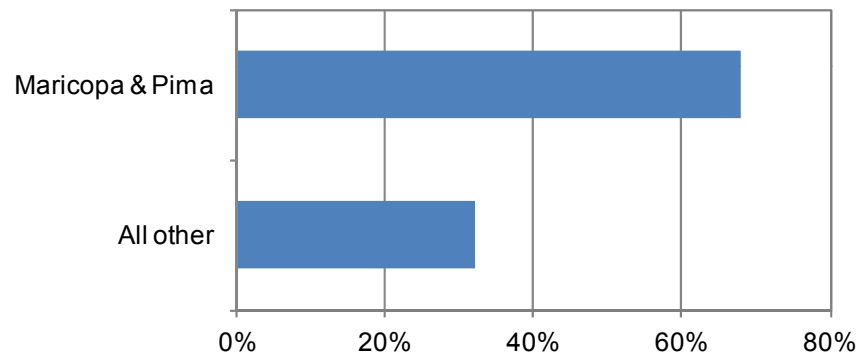
9



Source: Dean Runyan Associates

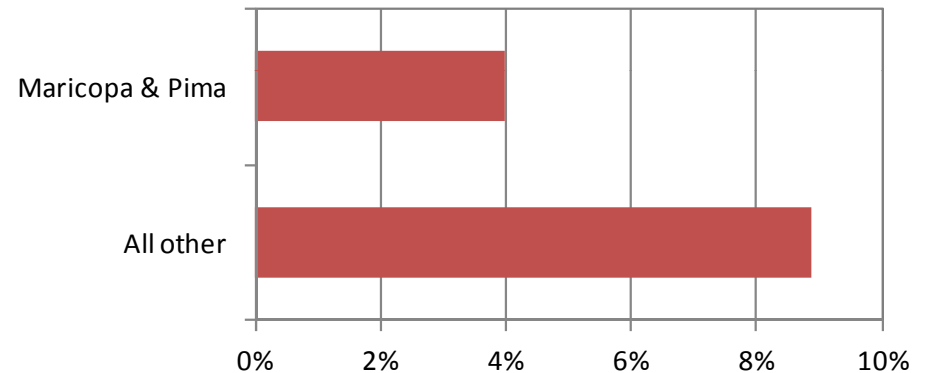
2011p, Distribution of Travel-Generated Employment

Percent of State Direct Travel-Generated Employment



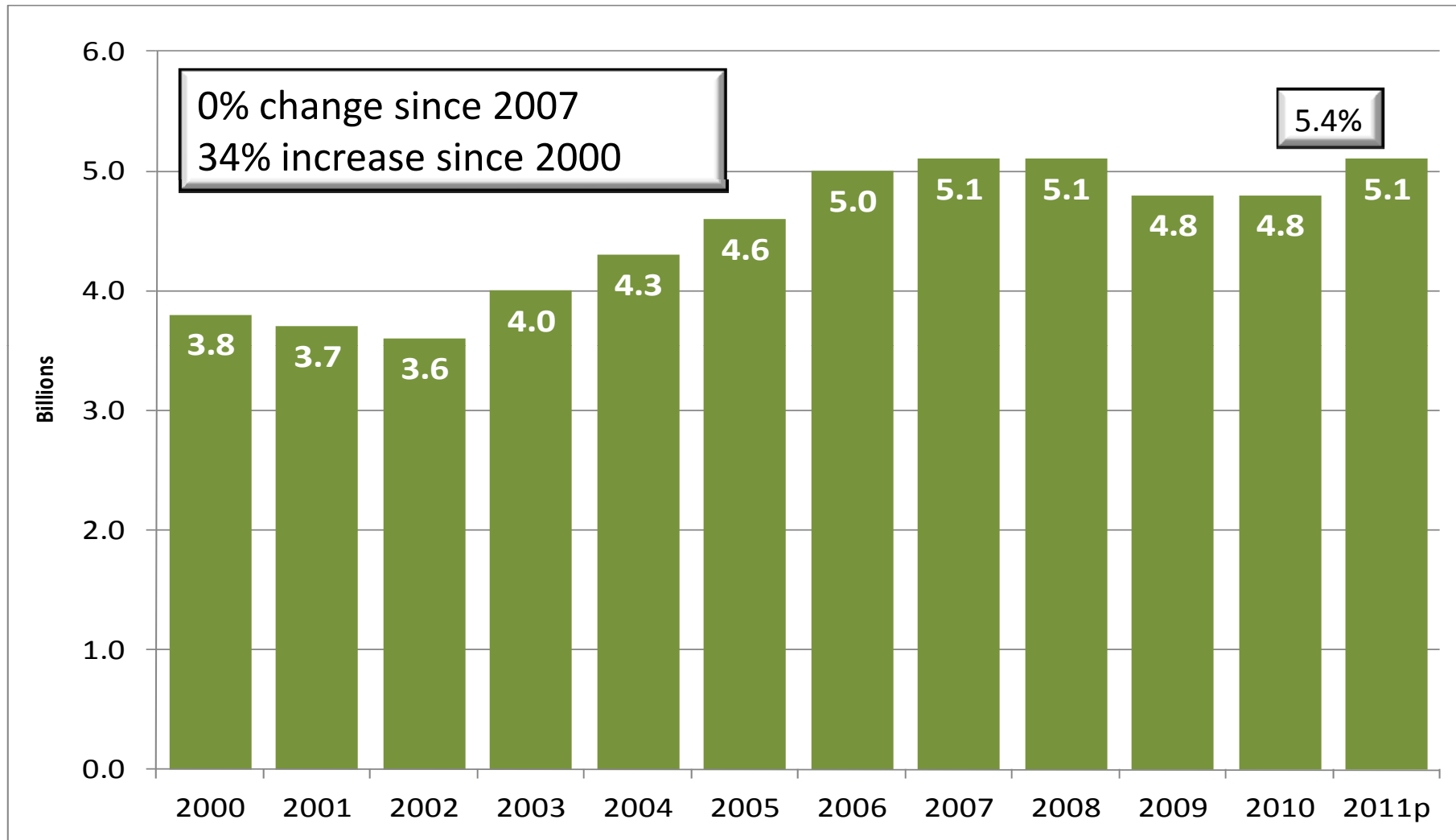
2011p, Travel-Generated Employment as Percent of Total Area Employment

Percent of Total Area Employment that is Travel-Generated



Direct Travel Earnings in Arizona (dollars) *historical comparison from 2000*

11

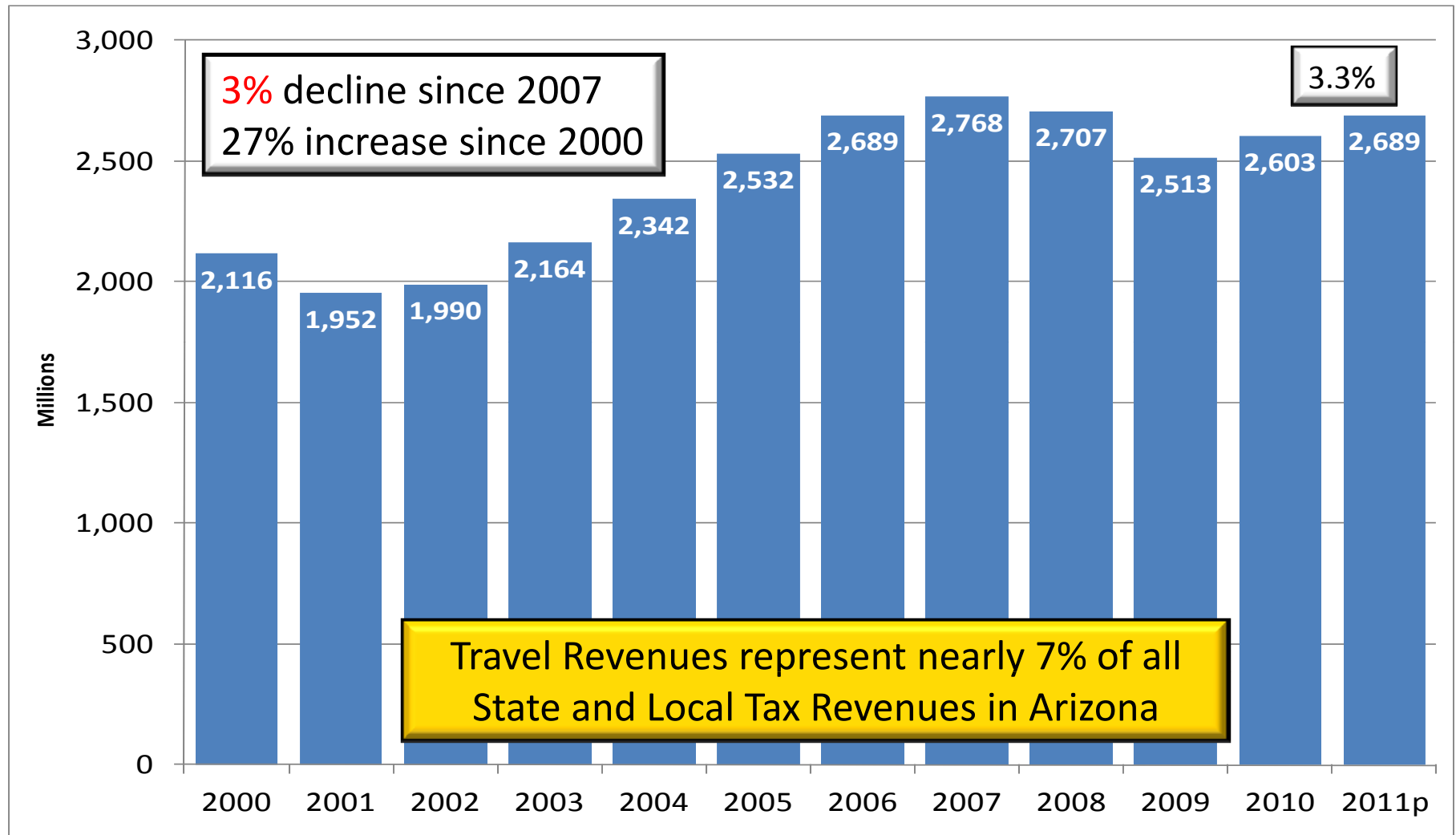


Source: Dean Runyan Associates

Local, State and Federal Tax revenue generated by Direct Travel Spending in Arizona

historical comparison from 2000

12



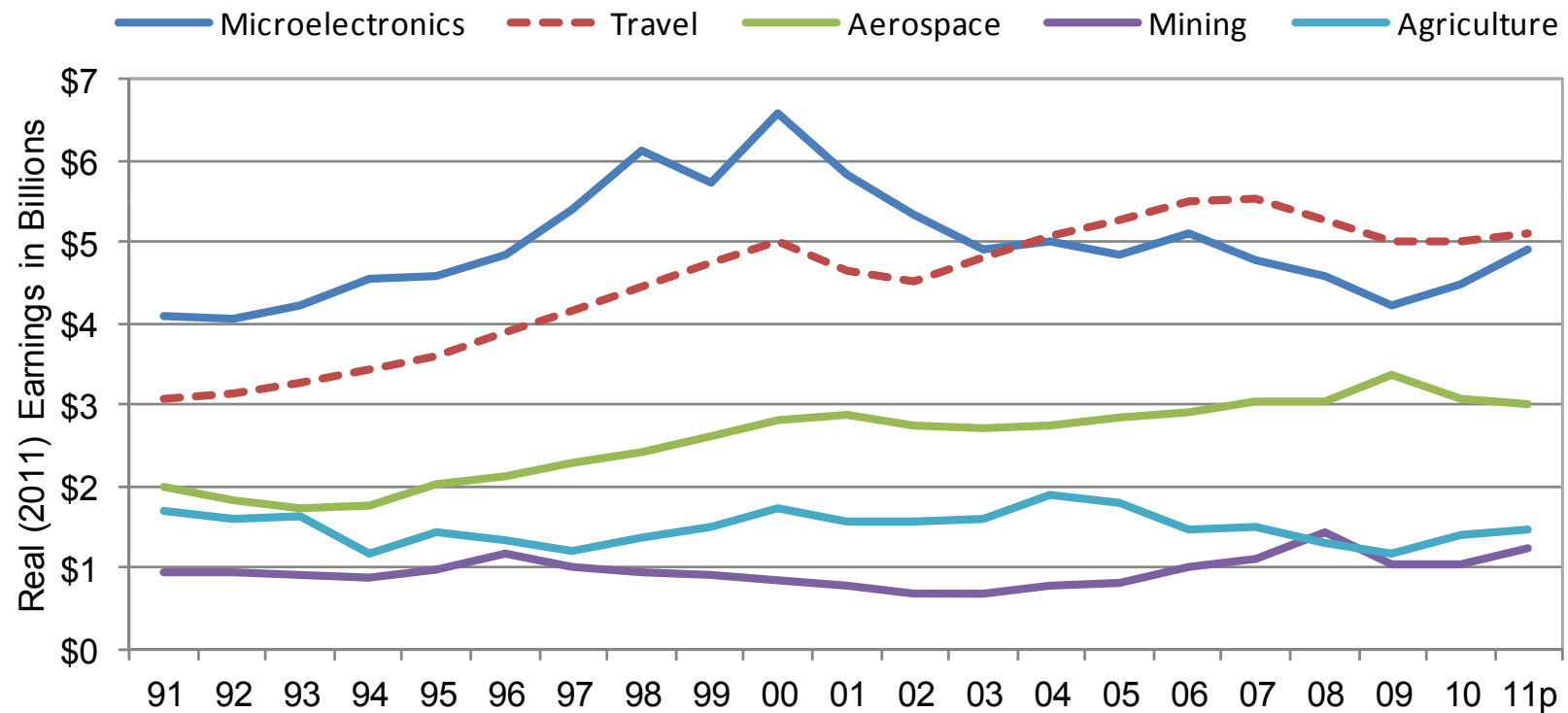
Source: Dean Runyan Associates



Annual Earnings, Selected AZ Export-Oriented Industries *historical* 13

comparison from 1991

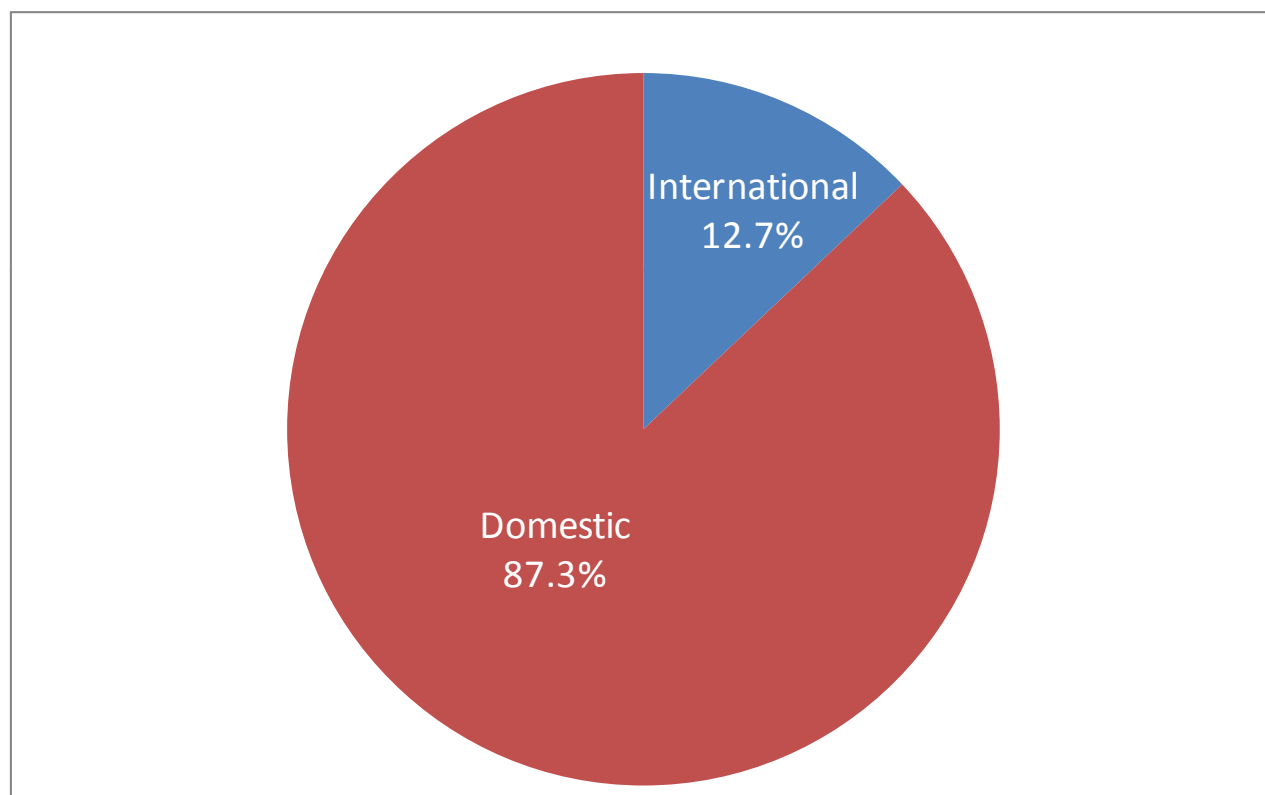
Annual Earnings, Select Arizona Export-Oriented Industries



Source: Dean Runyan Associates

Domestic & International Visitation

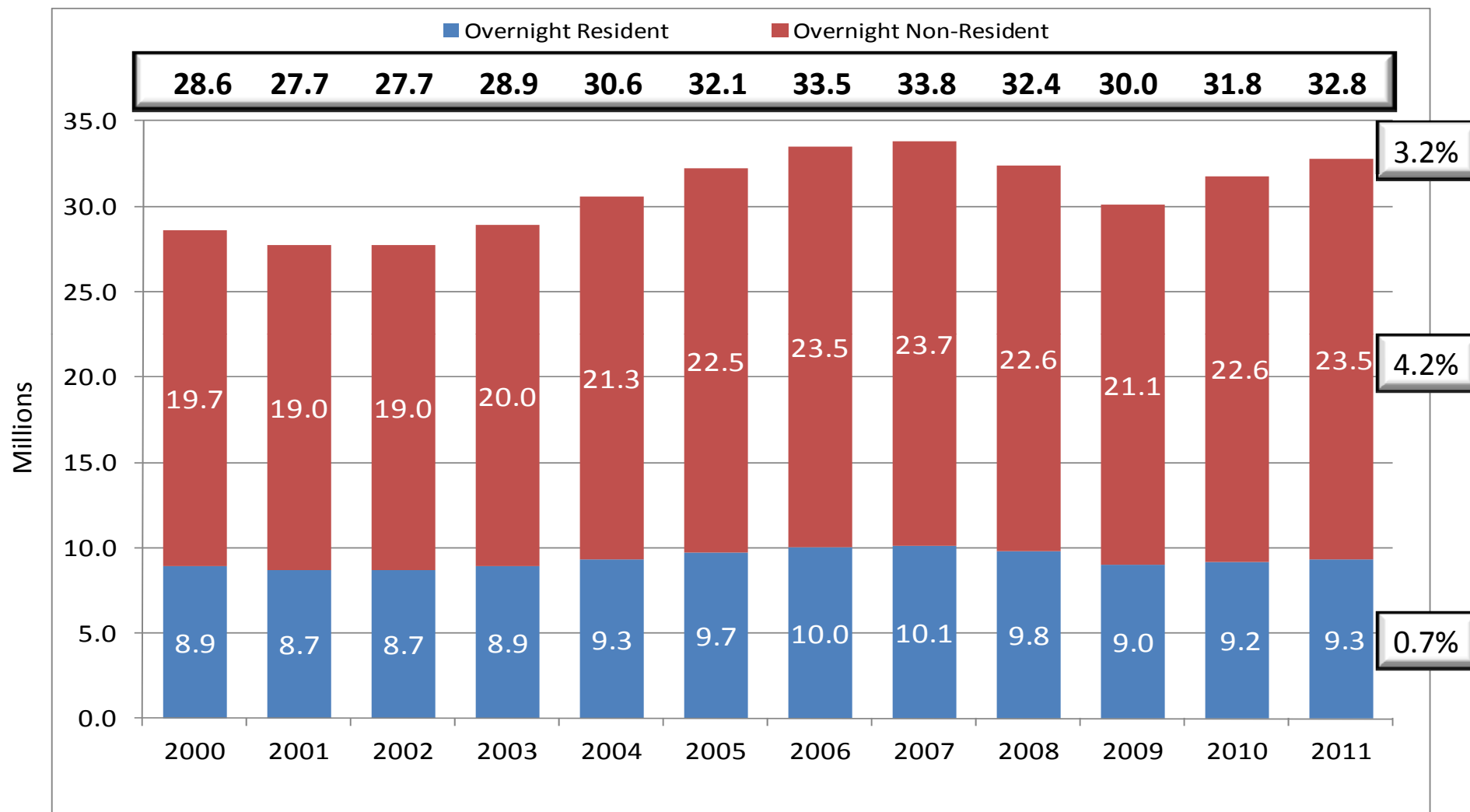
37.6 million Overnight Visitors to Arizona



Source: Tourism Economics, Office of Travel & Tourism Industries - U.S. Department of Commerce, 2007-08 Mexican Visitors to Arizona – University of Arizona, Statistics Canada

2011 Arizona Domestic Overnight Visitation Volume Resident vs. Non-Resident

16



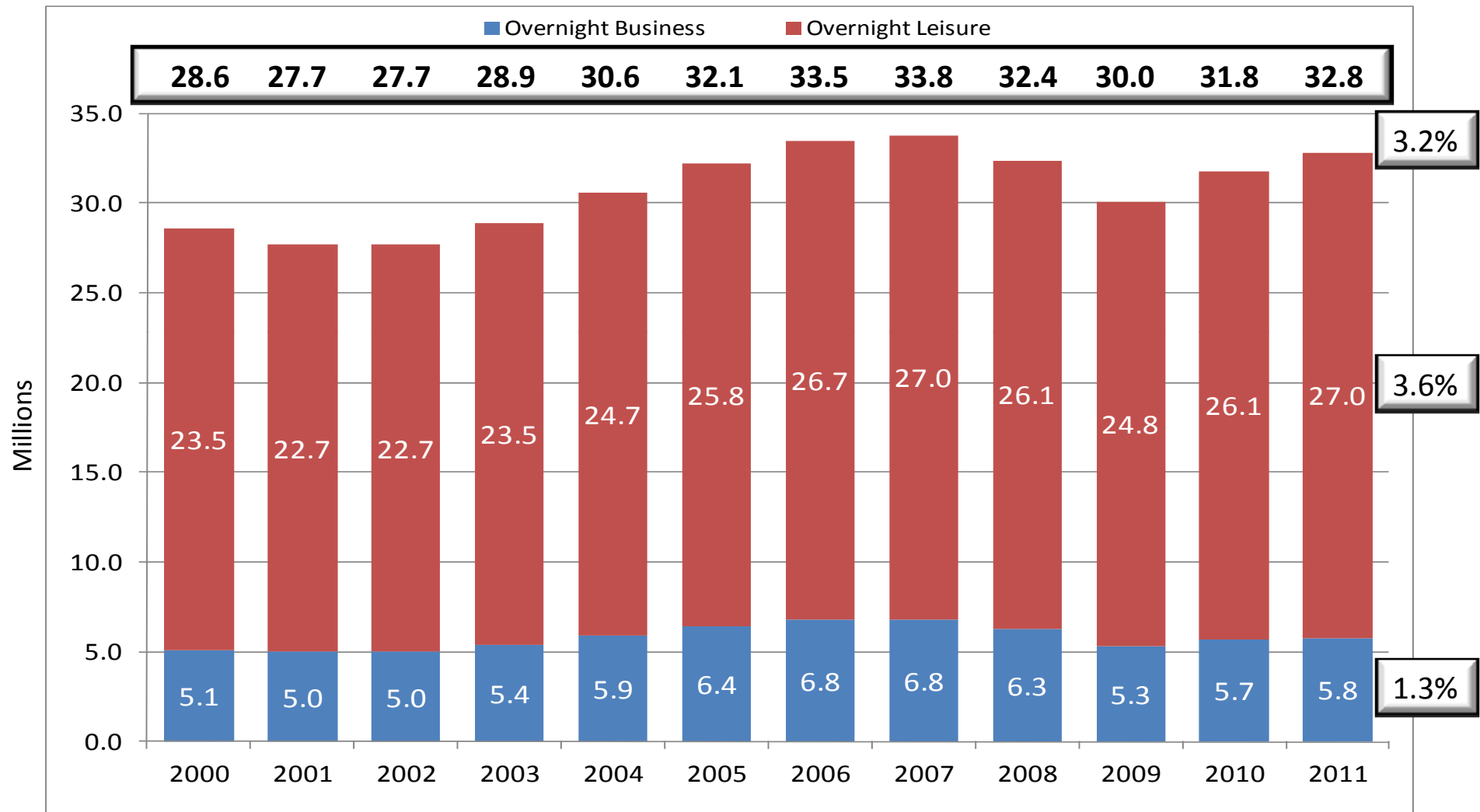
Source: Tourism Economics



2011 Arizona Domestic Overnight Visitation Volume

Leisure vs. Business

17



Source: Tourism Economics



2011 Arizona Overnight Visitor Profile: Domestic Overnight Visitors to U.S. vs. Arizona

18

	U.S. Total Domestic Overnight	Arizona Total Domestic Overnight
Share of U.S. Overnight Domestic Visitors		2.8% (rank #15)
Average Length of Stay	3.6 nights	4.0 nights
Average Travel Party Size	2.8 persons	2.7 persons
Purpose of Stay	46% VFR, 16% Business & 8% Special Event	44% VFR, 14% Business & 14% Touring
Average Age	45.4 years	47.2 years
Average Household Income	\$74,860	\$74,660
Mode of Transportation	63% Auto, 14% Air, 9% Rented Auto	50% Auto, 20% Air, 14% Rented Auto
Accommodations	63% Paid, 37% Non-Paid	68% Paid, 32% Non-Paid
Trip Quarter	26% Q3, 25% Q4	28% Q1, 25% Q2
Trip Expenditures <i>(excluding transportation to destination)</i>	\$593	\$663

Source: Longwoods International



2011 Arizona Overnight Visitor Profile: Domestic Overnight Residents vs. Non-Residents

19

	Domestic Overnight Non-Residents	Domestic Overnight Residents
Share of AZ Overnight Visitors	72 %	28 %
Average Length of Stay	4.8 nights	2.7 nights
Average Travel Party Size	2.7 persons	2.8 persons
Purpose of Stay	46% VFR, 15% Business & 15% Touring	41% VFR, 11% Outdoors & 11% Touring
Average Age	46.7 years	48.0 years
Average Household Income	\$79,070	\$66,300
Mode of Transportation	37% Auto, 26% Air, 18% Rented Auto	82% Auto, 4% Camper/RV, 3% Rented Auto
Accommodations	71% Paid, 29% Non-Paid	63% Paid, 37% Non-Paid
Trip Quarter	27% Q1, 26% Q2, 26% Q4	30% Q1, 26% Q3
Trip Expenditures <i>(excluding transportation to destination)</i>	\$831	\$382

Source: Longwoods International



2011 Arizona Overnight Visitor Profile: Domestic Overnight Leisure vs. Business

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	Domestic Overnight Leisure	Domestic Overnight Business
Share of AZ Overnight Visitors	82 %	18 %
Average Length of Stay	4.1 nights	3.5 nights
Average Travel Party Size	2.8 persons	2.1 persons
Purpose of Stay	52% VFR, 16% Touring & 10% Special Event	73% General Business & 27% Conf./Convention
Average Age	46.9 years	48.8 years
Average Household Income	\$73,080	\$86,500
Mode of Transportation	52% Auto, 18% Air, 13% Rented Auto	33% Auto, 30% Air, 20% Rented Auto
Accommodations	66% Paid, 34% Non-Paid	87% Paid, 13% Non-Paid
Trip Quarter	28% Q1, 25% Q2	33% Q1, 24% Q2
Trip Expenditures <i>(excluding transportation to destination)</i>	\$644	\$778

Source: Longwoods International



Top Origin Markets for International Travelers to the U.S. (2011 vs. 2010 & 2007)

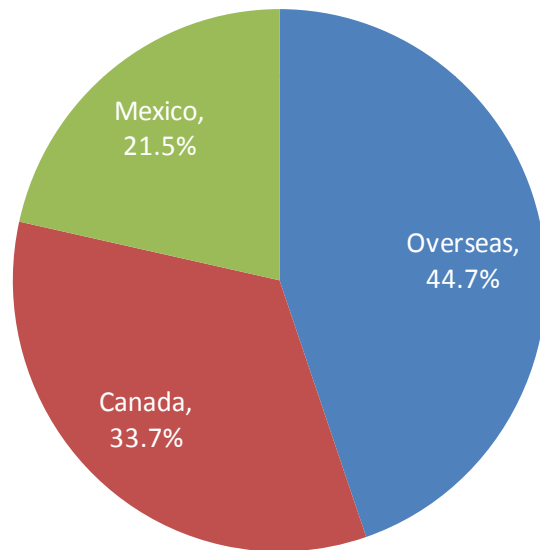
Origin of Visitor		2011 (mill)	11/10 (% change)	11/07 (% change)
1	Canada	21.0	5.4%	18.4%
2	Mexico	13.4	-0.1%	not available
	Overseas	27.9	11.0%	16.7%
3	United Kingdom	3.8	-0.4%	-14.7%
4	Japan	3.2	-4.0%	-8.0%
5	Germany	1.8	5.7%	19.7%
6	Brazil	1.5	25.9%	135.9%
7	France	1.5	12.1%	50.8%
8	S. Korea	1.1	3.4%	42.1%
9	China (EXCL Hong Kong)	1.1	35.9%	101.8%
10	Australia	1.0	14.8%	55.0%
International Total		62.3	8.9%	11.3%

Source: Office of Travel & Tourism Industries - U.S. Department of Commerce; Secretaria de Turismo (Mexico); Statistics Canada

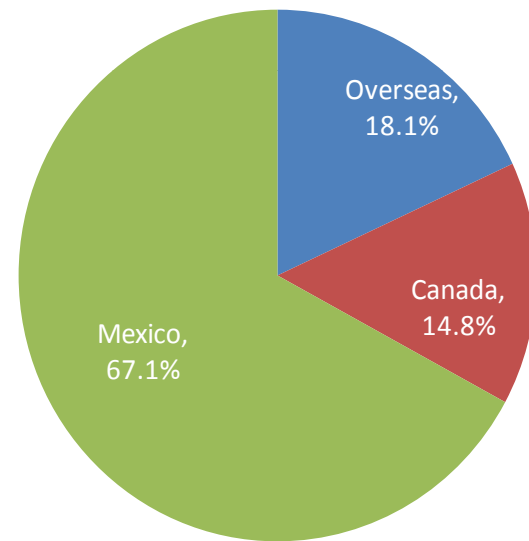
2011 International Visitation Market Share – U.S. vs. Arizona

22

International to U.S.
62.3 million overnight visitors



International to Arizona
4.8 million overnight visitors

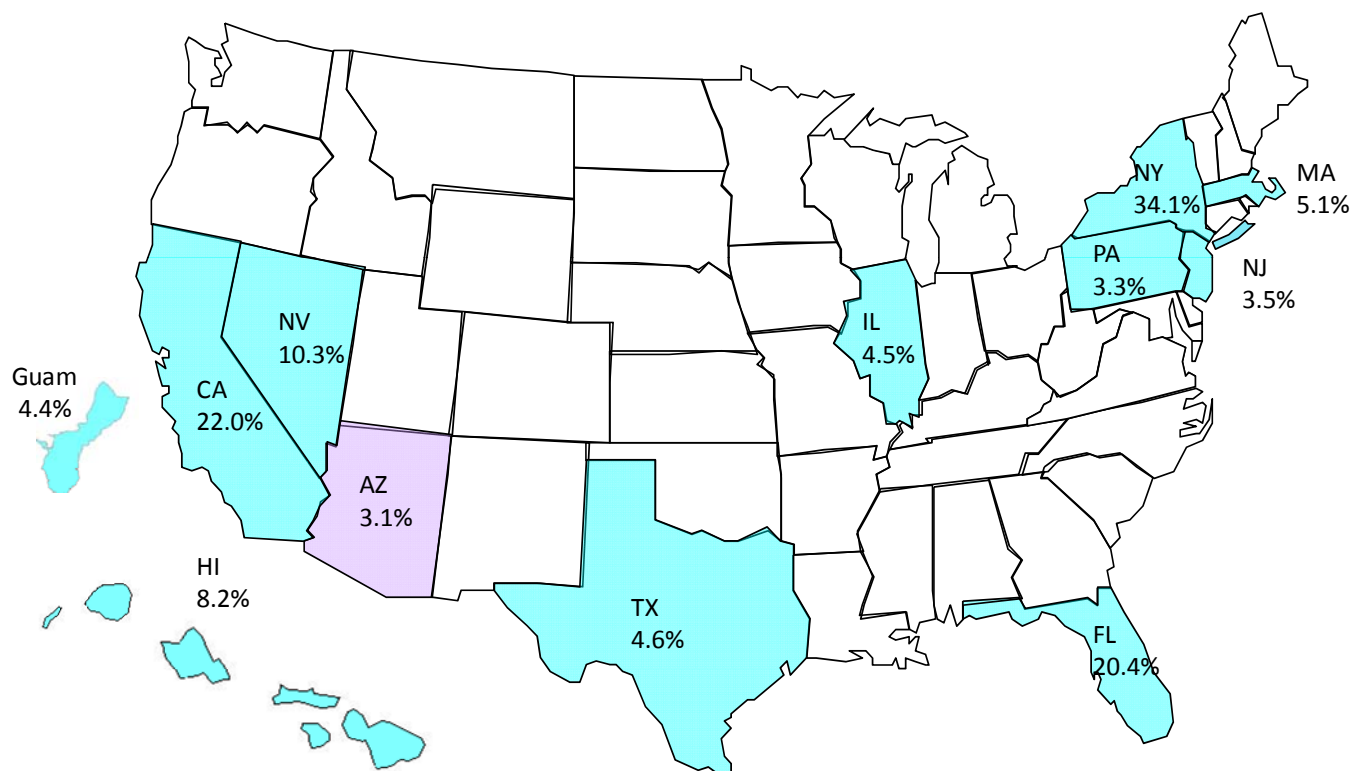


Source: Office of Travel & Tourism Industries - U.S. Department of Commerce, 2007-08 Mexican Visitors to Arizona – University of Arizona, Statistics Canada, Tourism Economics

Arizona had an increase of 13% in Overseas Visitation *(excluding Canada & Mexico)*

U.S. Market Share*

1.	New York	34.1%
2.	California	22.0%
3.	Florida	20.4%
4.	Nevada	10.3%
5.	Hawaii	8.2%
6.	Massachusetts	5.1%
7.	Texas	4.6%
8.	Illinois	4.5%
9.	Guam	4.4%
10.	New Jersey	3.5%
11.	Pennsylvania	3.3%
12.	Arizona	3.1%

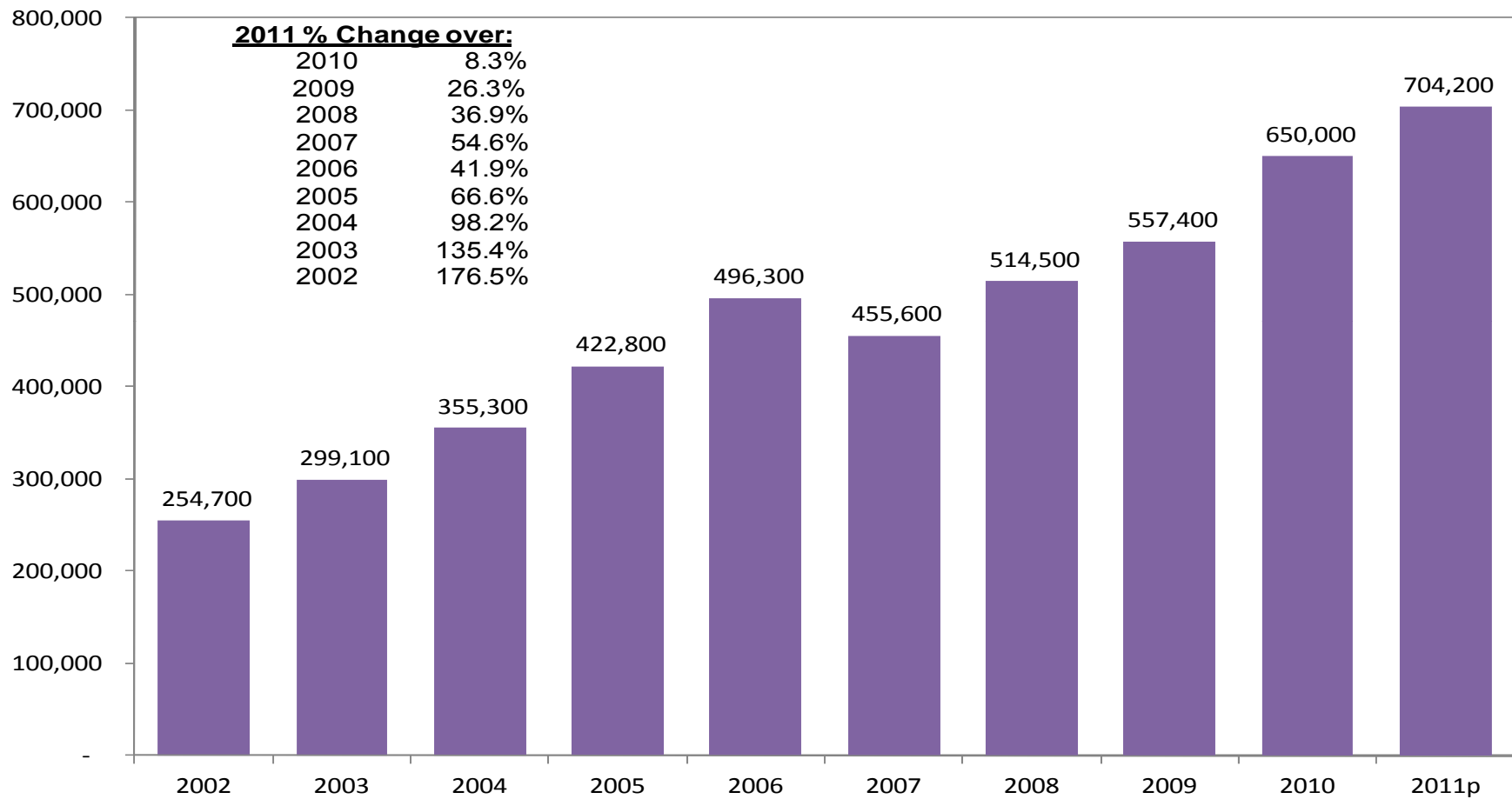


Source: Office of Travel & Tourism Industries, U.S. Department of Commerce

* Based on Overseas Visitors (excluding Canada & Mexico)

2011 Canadian Visitation to Arizona

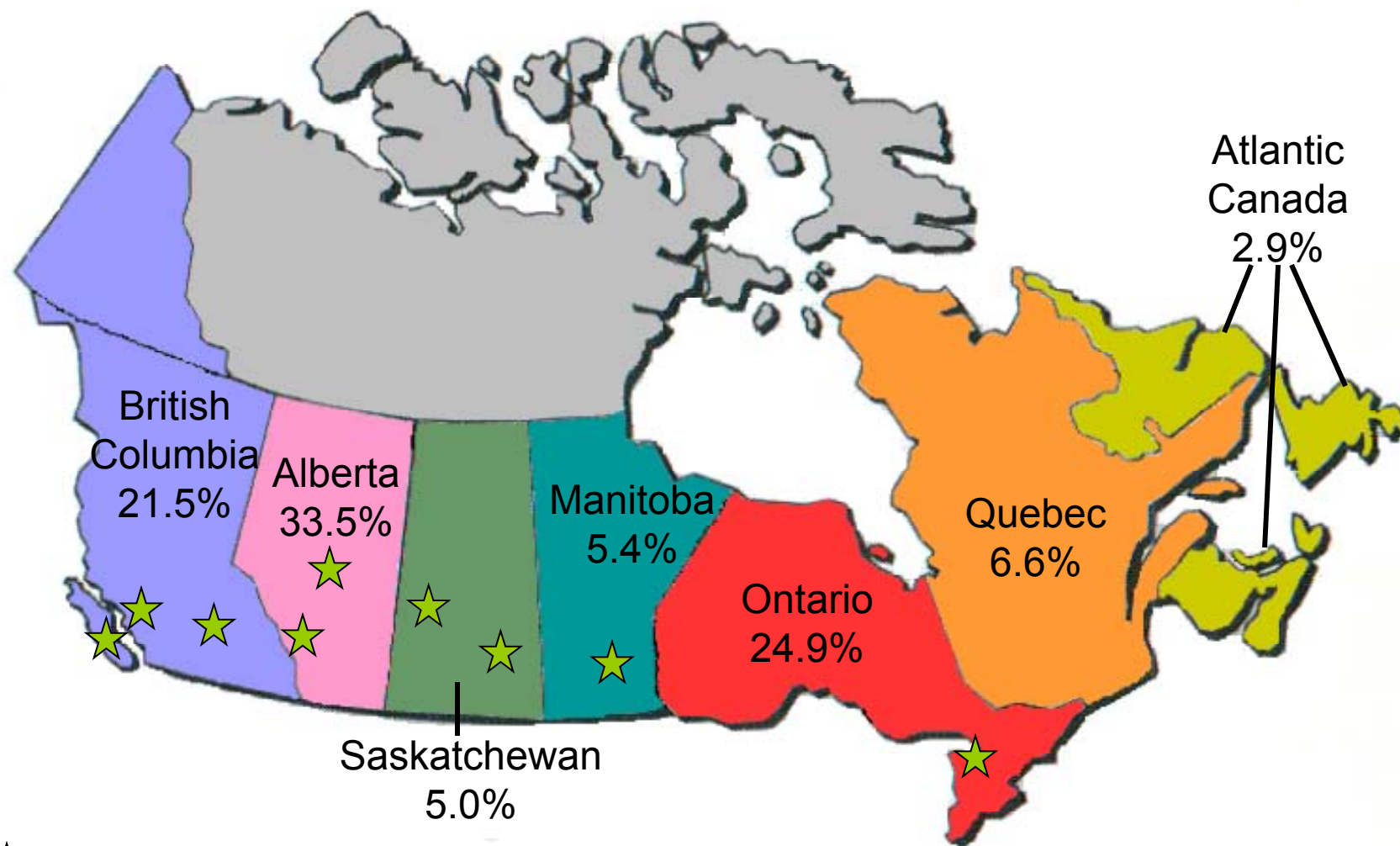
24



Source: Statistics Canada – 2011 volume is preliminary

2011 Canadian Visitation to Arizona by Province (by Market Share)

25



★ Stars represent air service to Phoenix in 2011

Source: Statistics Canada

2011 Canadian Visitation to Arizona by Province

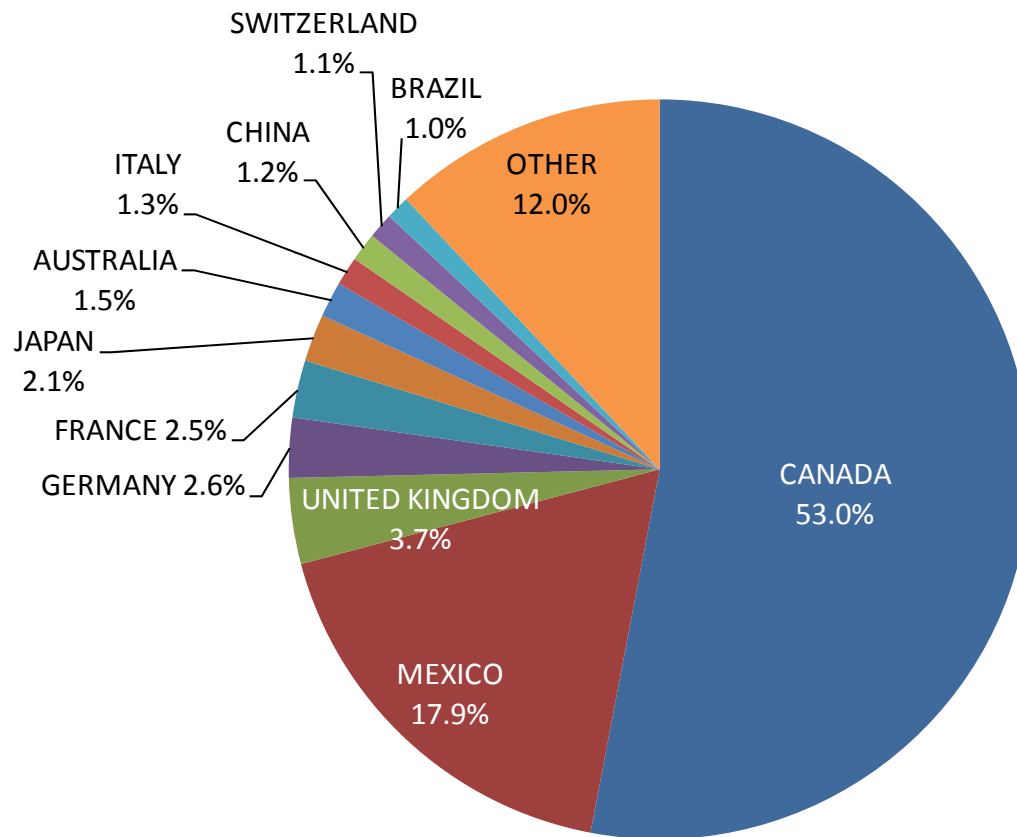
26

Province	2011 (preliminary)	% Change 11/10	% Change 11/07
Alberta	236,000	0.8%	59.4%
Ontario	175,000	2.3%	32.8%
British Columbia	151,200	20.6%	49.7%
Quebec	46,200	25.9%	79.1%
Manitoba	37,700	70.6%	90.4%
Saskatchewan	34,800	-27.0%	97.8%
Atlantic Canada	20,600	60.9%	80.7%
TOTAL	704,200	8.4%	54.6%

Source: Statistics Canada



**2011 VisaVUE Spending in Arizona
(by market share)**



Source: The Arizona Office of Tourism estimates based on and extrapolated from aggregate card usage data provided by VisaVue Travel for the period of 2011 and incorporates data from other independent research sources.

Indicators

Arizona Indicators - Summary

2011 compared with 2010, 2007 & 2000

29

2011 Arizona Tourism Indicators							
Indicator	% Change from 2000		% Change from 2007		% Change from 2010		2011 Volume
Tourism Related Tax	▲	40.4%	▼	-10.0%	▲	8.0%	\$532,853,241
Air Traffic (Enplaned & Deplaned)		N/A	▲	0.8%	▲	4.8%	46,450,460
State Park Visitation	▼	-14.5%	▼	-10.7%	▼	-5.4%	2,062,402
National Park Visitation	▼	-8.8%	▲	1.1%	▲	2.1%	11,910,446
Statewide Lodging							
<i>Occupancy</i>	▼	-6.5%	▼	-13.0%	▲	3.2%	57.6%
<i>ADR</i>	▲	9.5%	▼	-9.7%	▲	2.8%	\$95.23
<i>RevPAR</i>	▲	2.4%	▼	-21.5%	▲	6.0%	\$54.85
<i>Demand</i>	▲	9.9%	▼	-3.0%	▲	3.6%	23,413,796
<i>Supply</i>	▲	17.5%	▲	11.5%	▲	0.5%	40,651,926

* The above tax estimates DO NOT include the 1% temporary tax increase which took effect June 1, 2010.

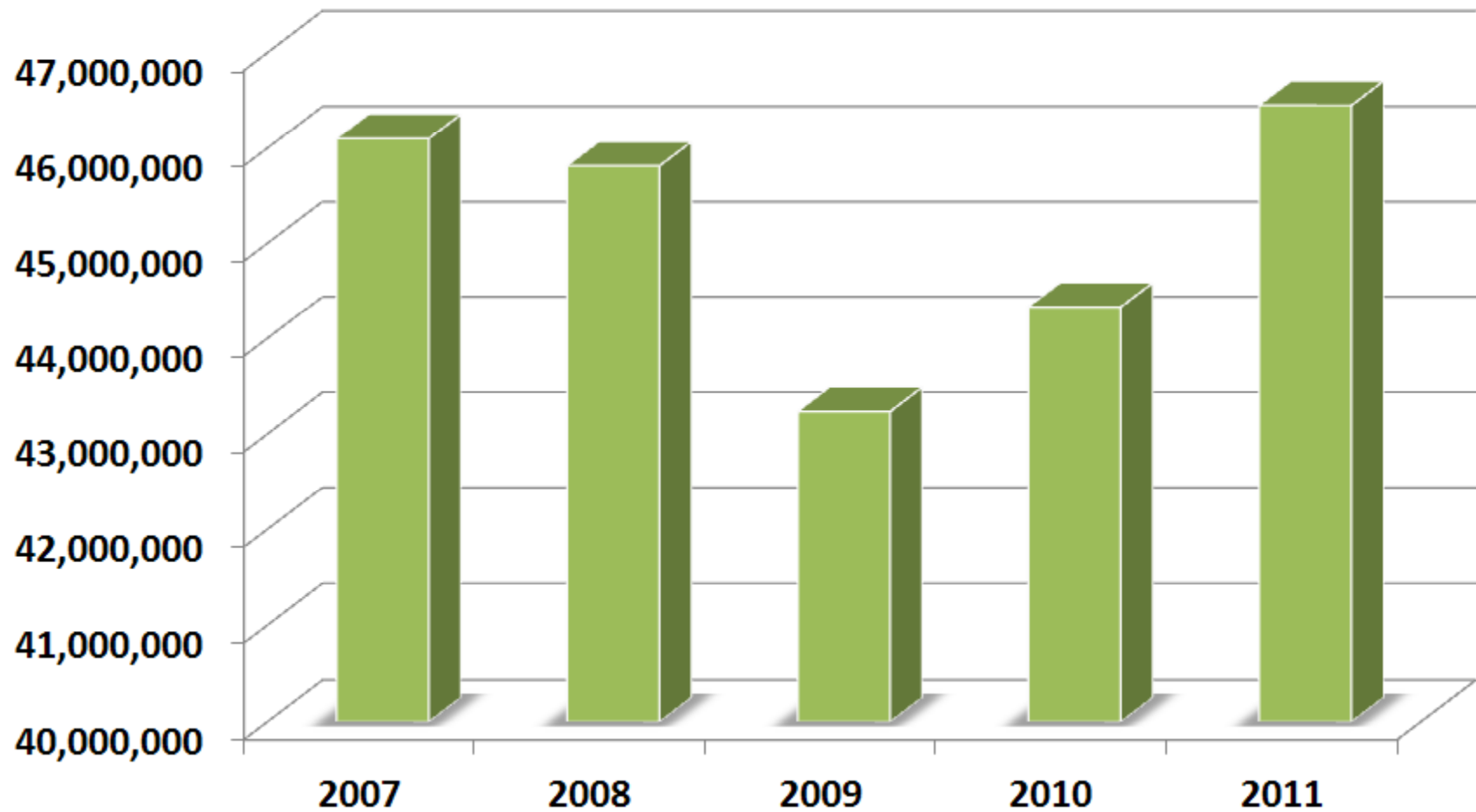
Source: Arizona State Parks, National Park Service, Individual Arizona Airports, Arizona Dept. of Revenue, Northern Arizona University and Smith Travel Research



Arizona Airports

Annual Enplaned and Deplaned 2007 – 2011

30

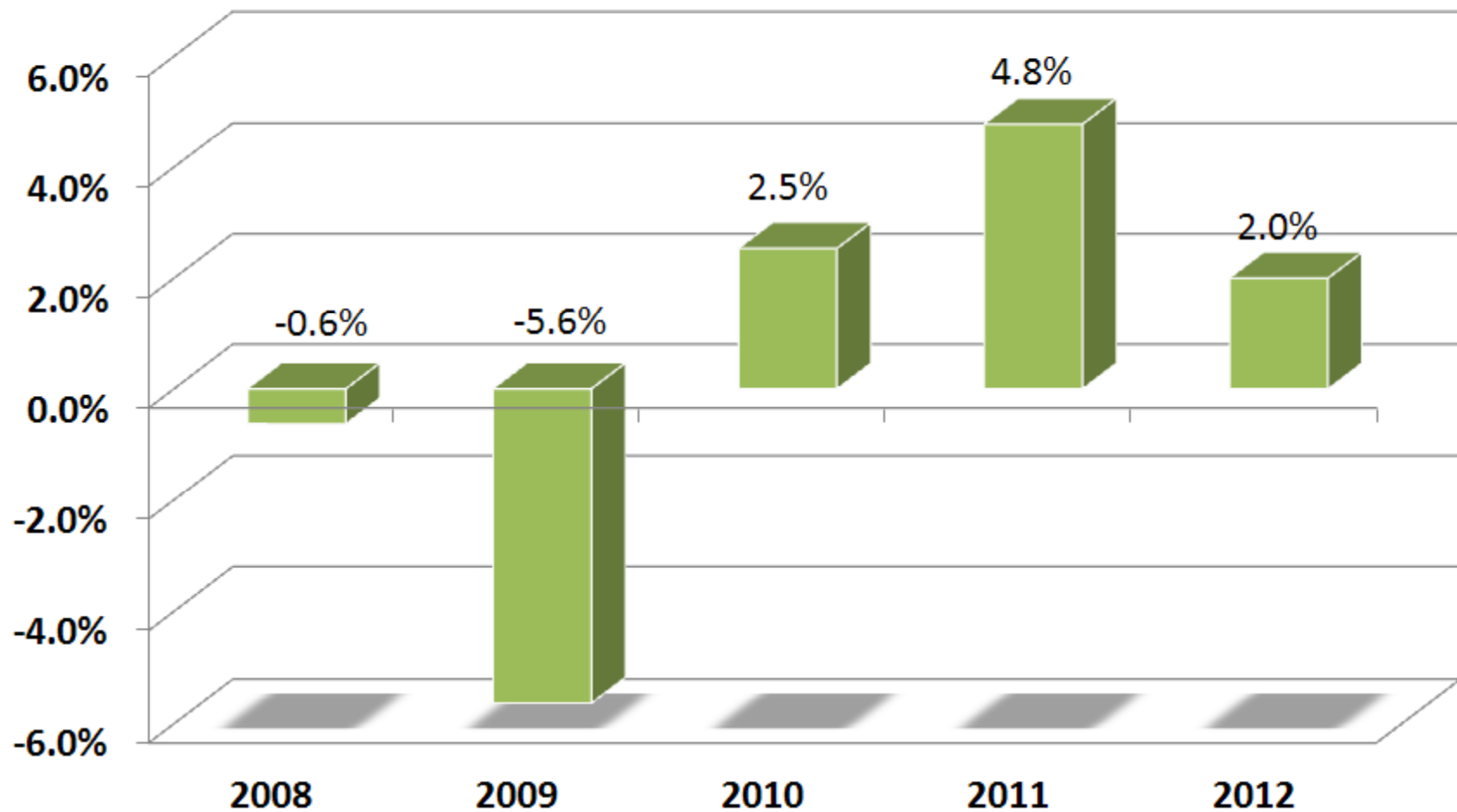


Source: Individual Arizona Airports

Arizona Airports

Annual % Change Enplaned and Deplaned 2008 – 2012 YTD thru April

31

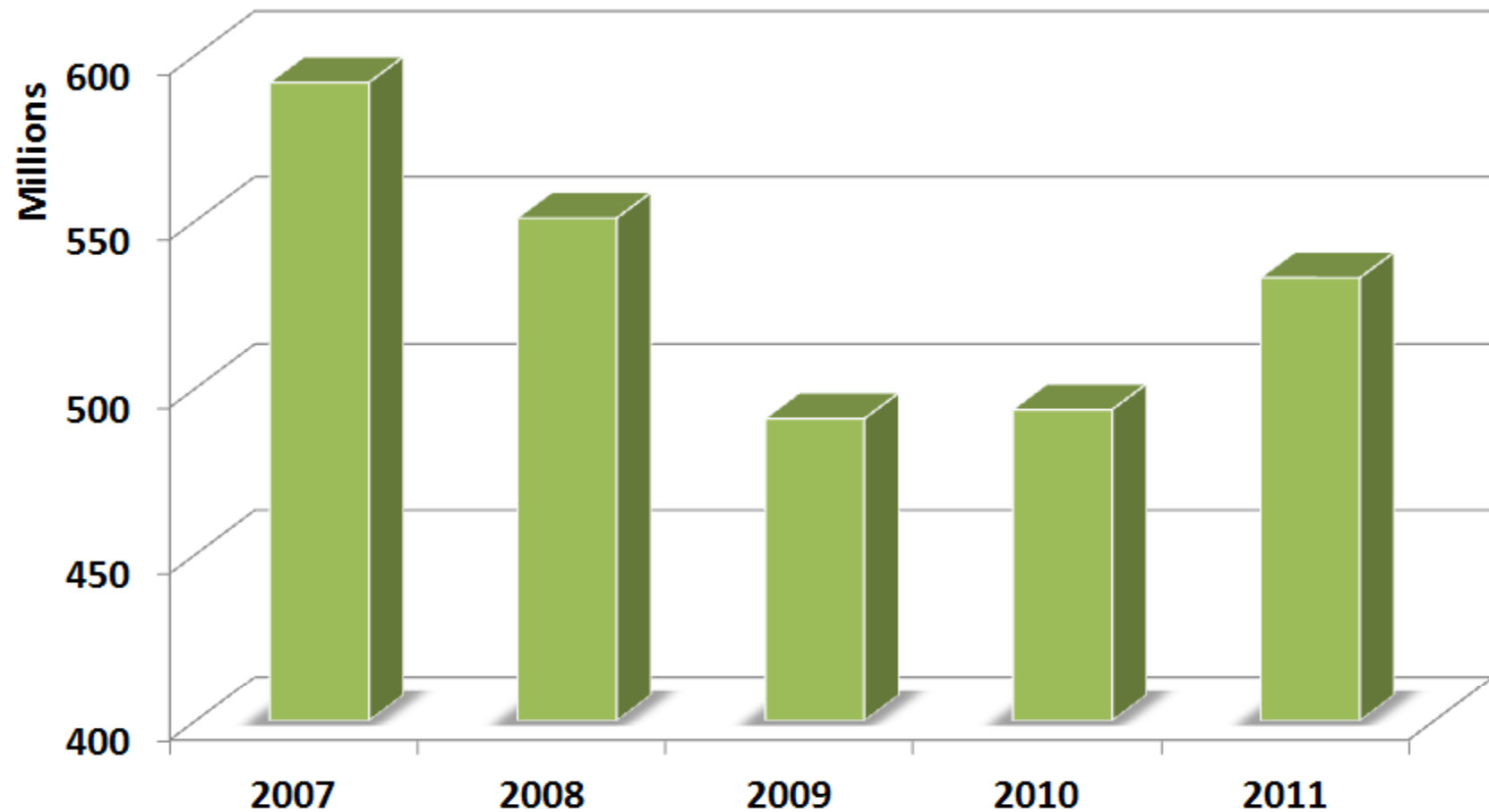


Source: Individual Arizona Airports

Arizona Tourism Taxes

Annual Volume 2007 - 2011

32



* The above tax estimates DO NOT include the 1% temporary tax increase which took effect June 1, 2010.

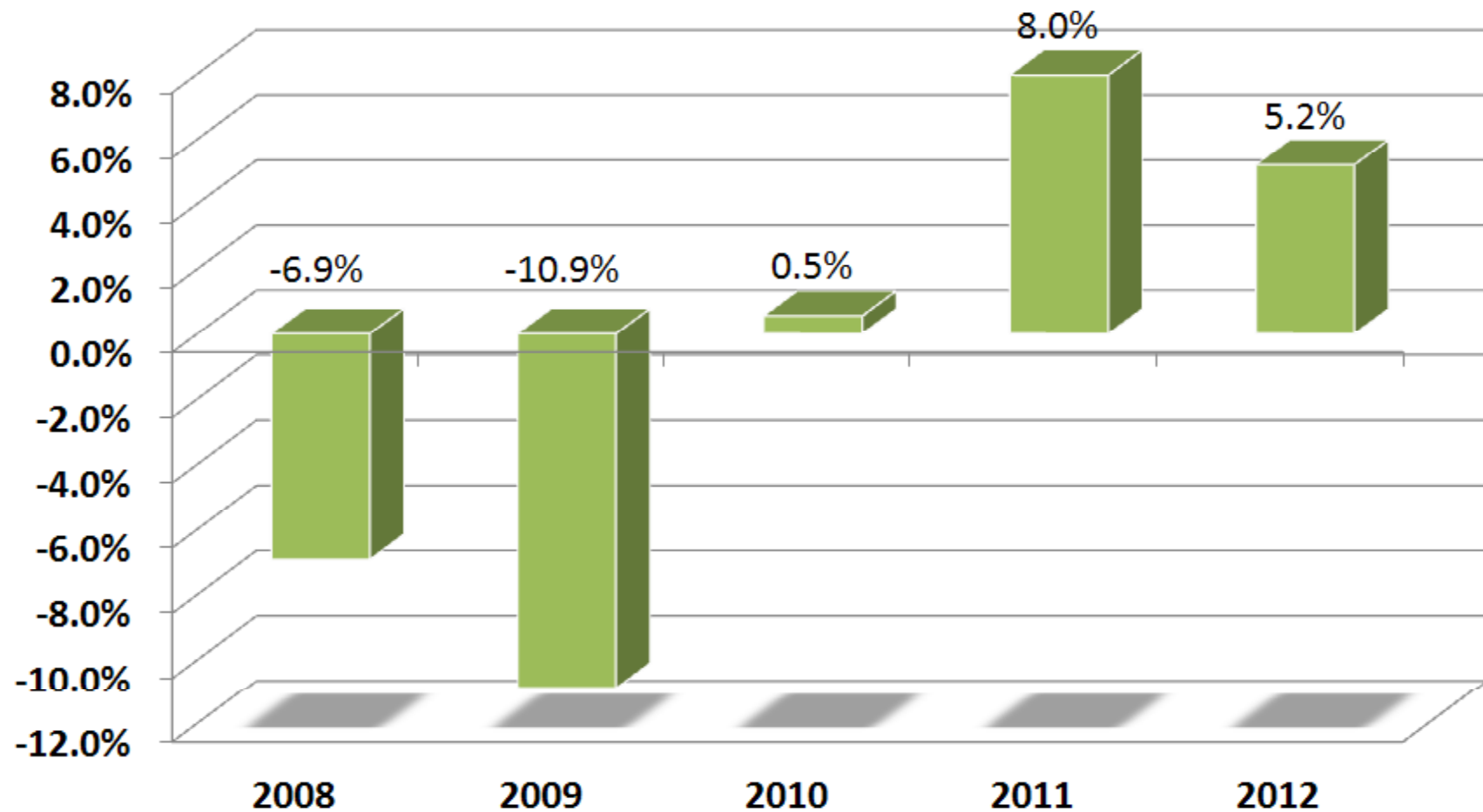
Source: Arizona Department of Revenue, Northern Arizona University



Arizona Tourism Taxes

Annual % Change 2008 – 2012 YTD thru April

33



* The above tax estimates DO NOT include the 1% temporary tax increase which took effect June 1, 2010.

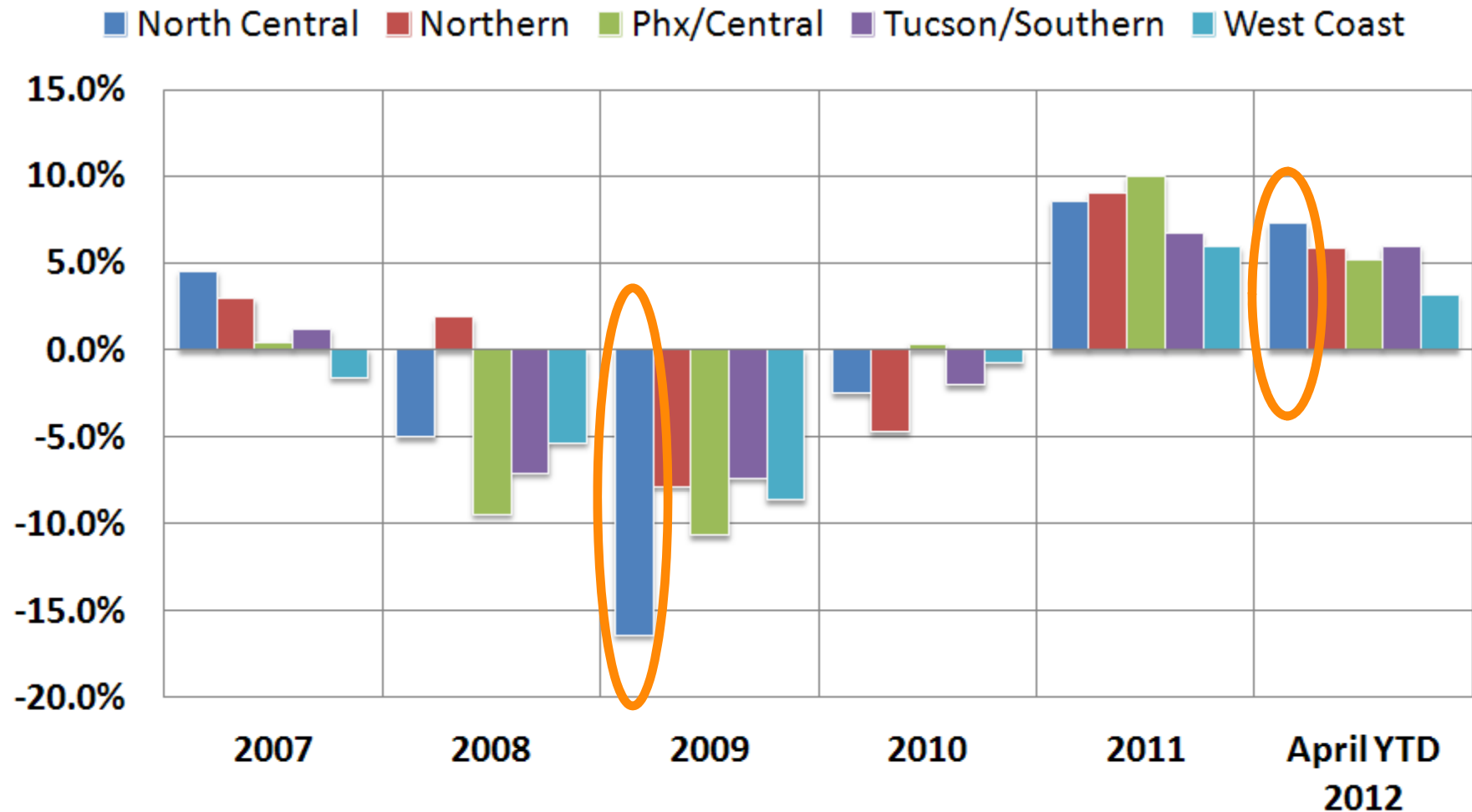
Source: Arizona Department of Revenue, Northern Arizona University



Arizona Tourism Taxes

Annual % Change by region 2007 – 2012 YTD

34

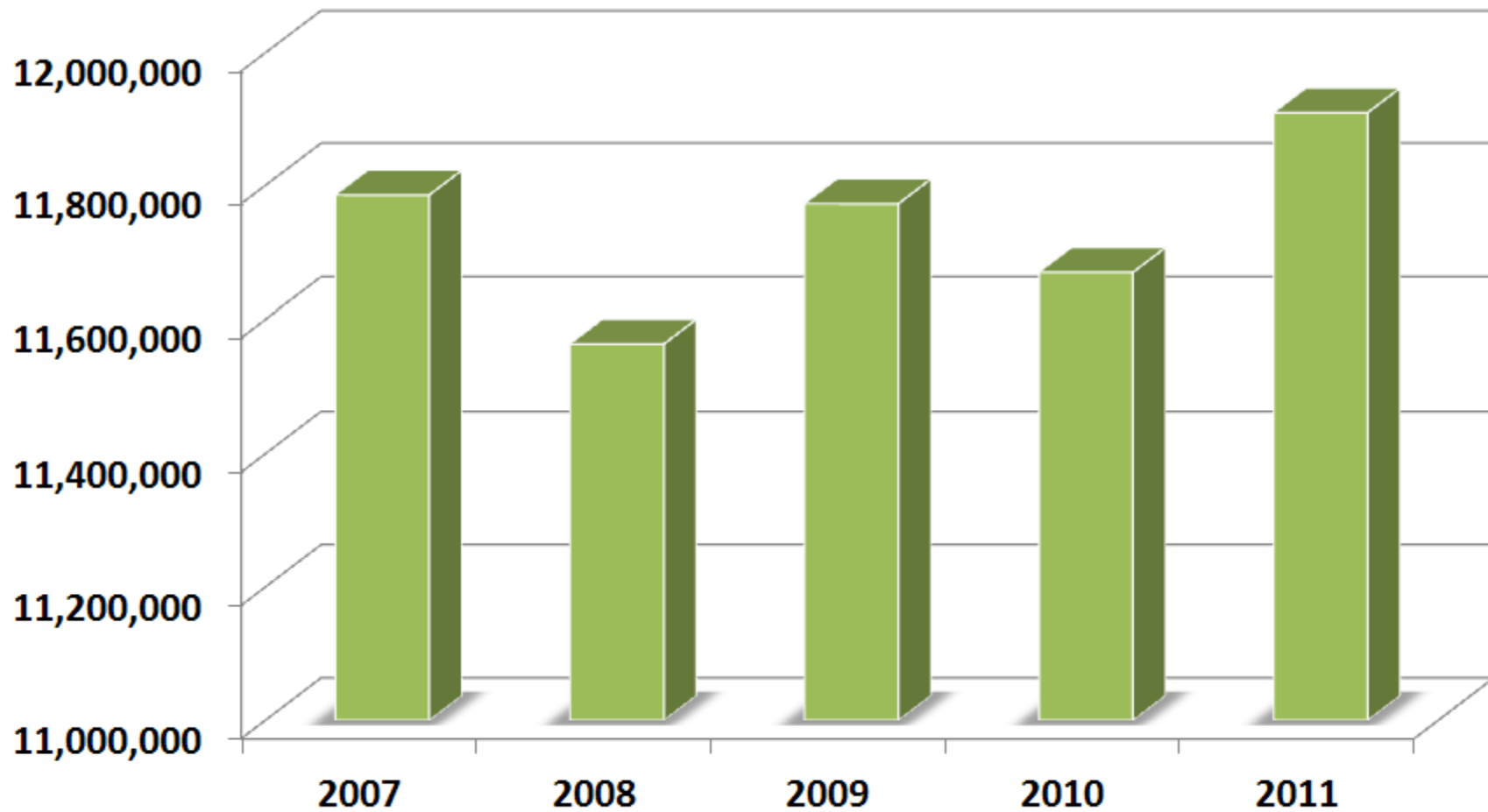


Source: Arizona Department of Revenue, Northern Arizona University

Arizona National Park Visitation

Annual Volume 2007 – 2011

35

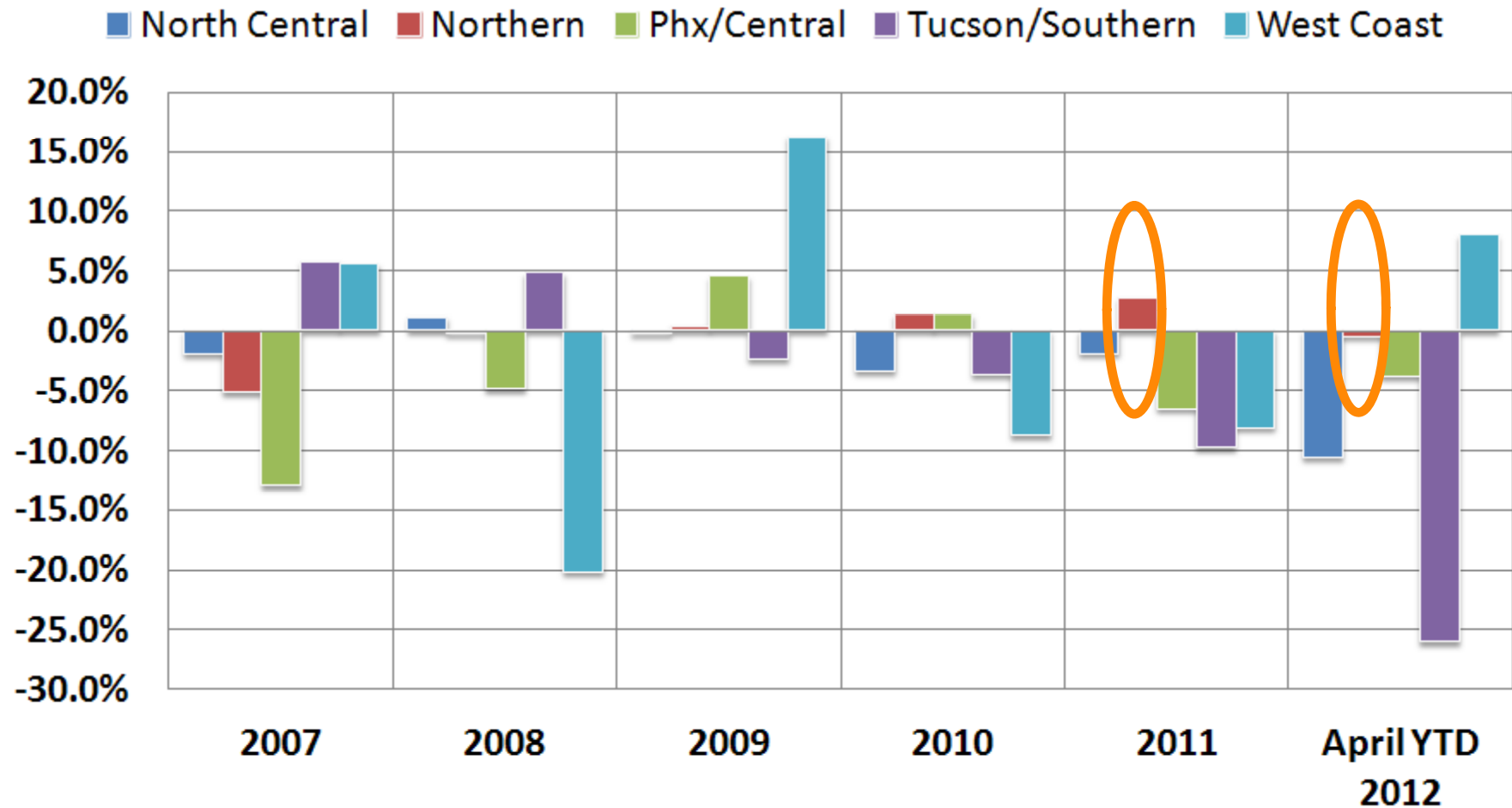


Source: National Park Service

Arizona National Park Visitation

Annual % Change by region 2007 – 2012 YTD thru April

36

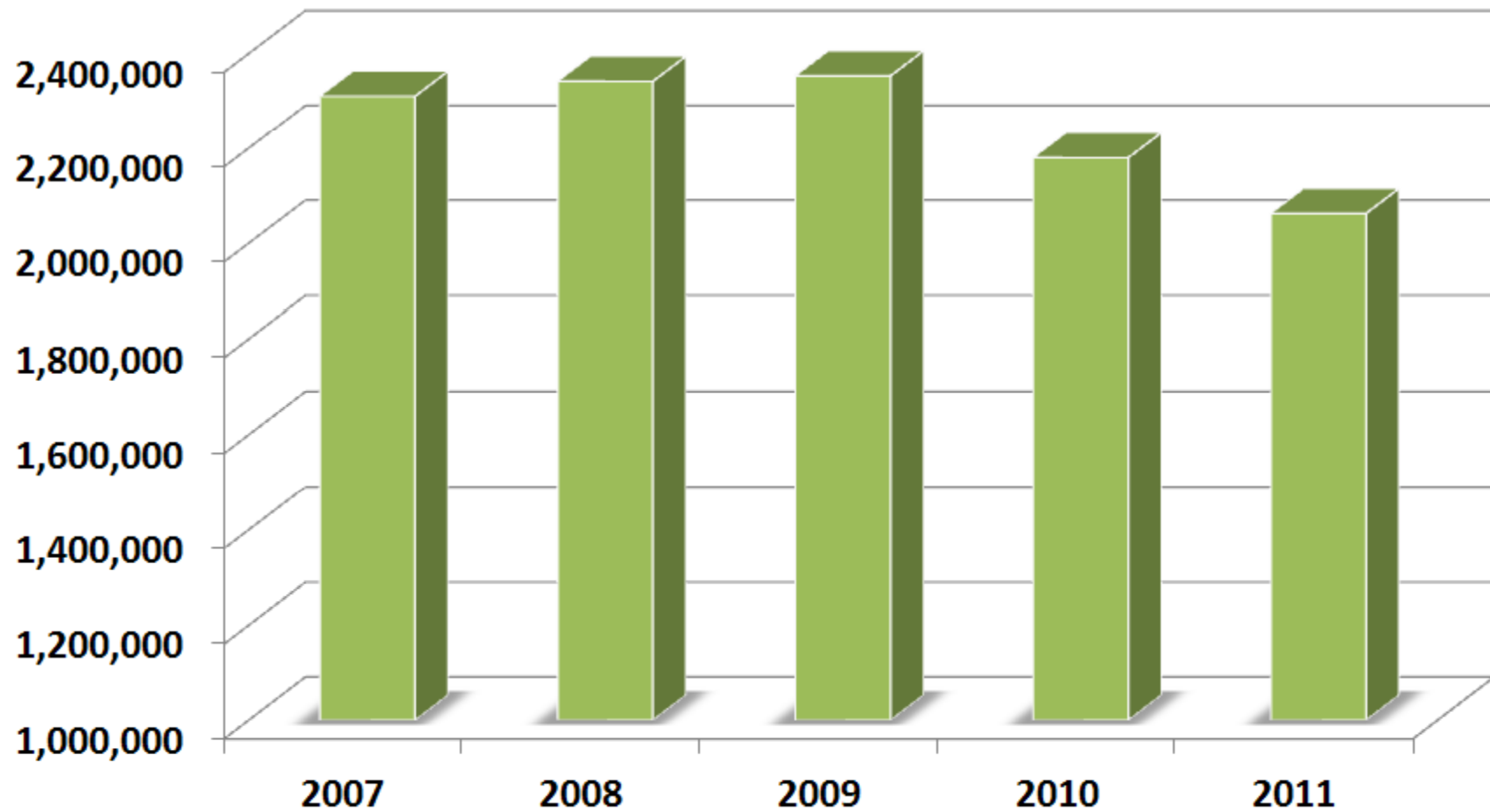


Source: National Park Service

Arizona State Park Visitation

Annual Volume 2007 – 2011

37

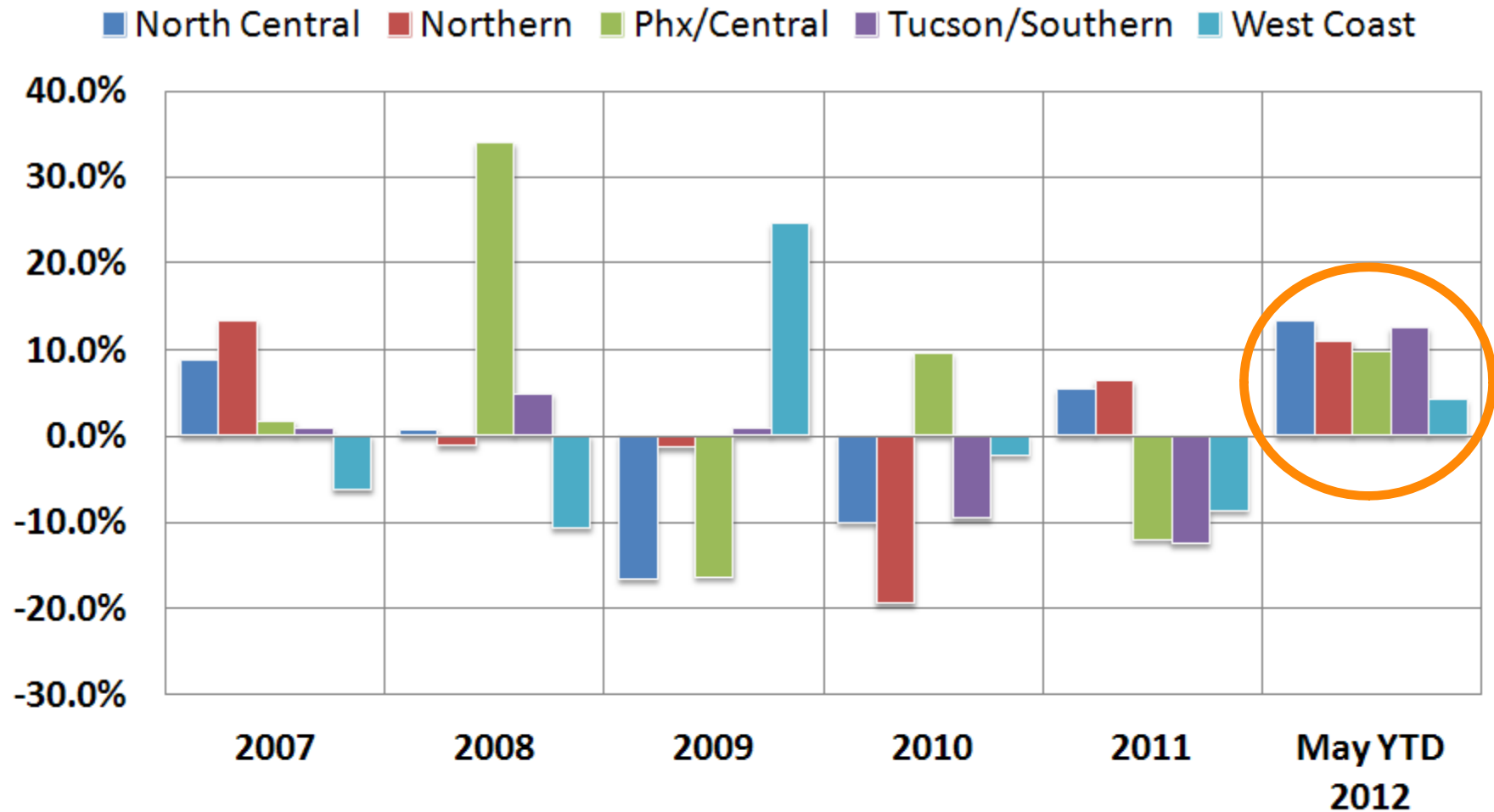


Source: Arizona State Parks

Arizona State Park Visitation

Annual % Change by region 2007 – 2012 YTD thru May

38



Source: Arizona State Parks

$$\text{Demand} \div \text{Supply} = \text{Occupancy}$$

$$\begin{aligned} &\text{Occupancy} \times \text{Average Daily Rate (ADR)} \\ &= \text{Revenue Per Available Room (RevPAR)} \end{aligned}$$

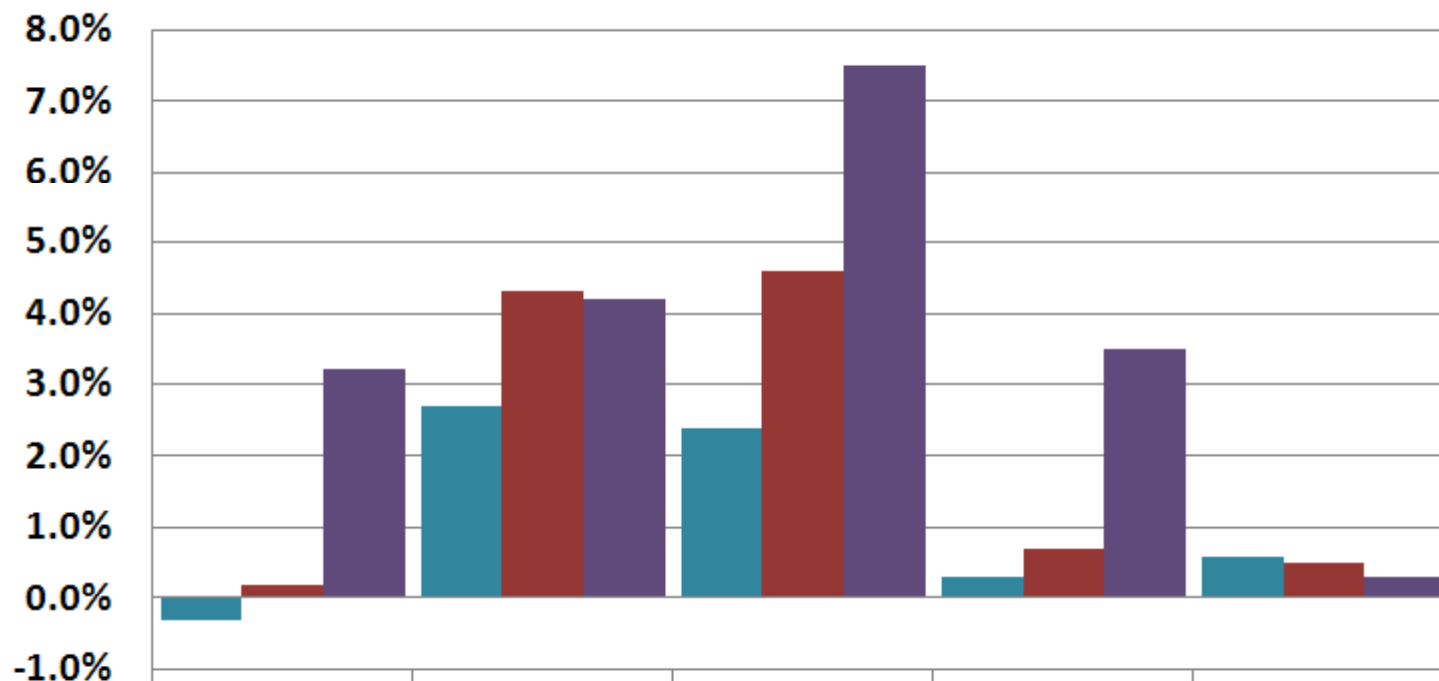
Arizona Lodging – Comparison to U.S & Mountain Region

% Change YTD: May 2012

40



Mountain
Region



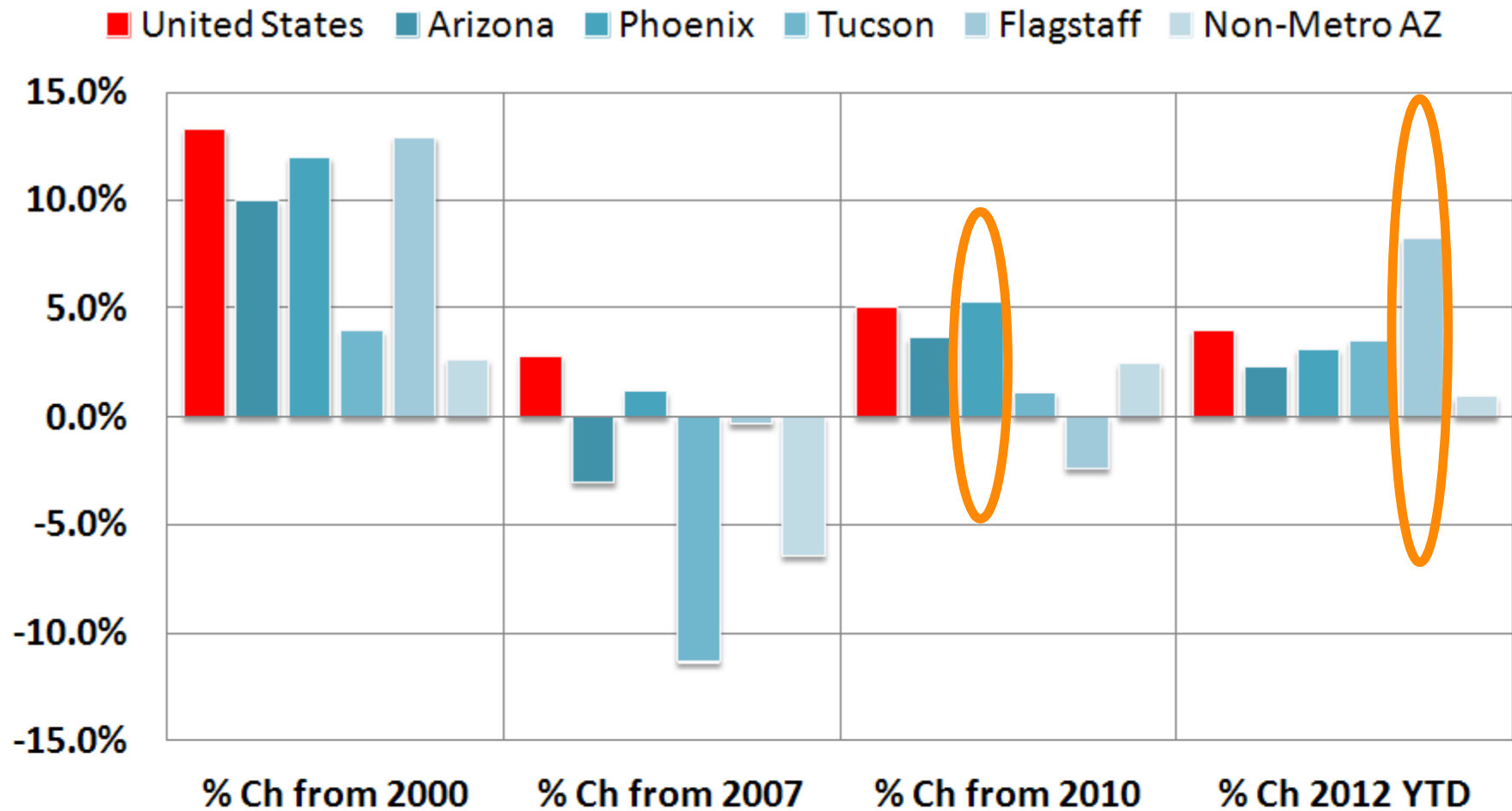
	Occupancy	ADR	RevPAR	Demand	Supply
Arizona	-0.3%	2.7%	2.4%	0.3%	0.6%
Mountain	0.2%	4.3%	4.6%	0.7%	0.5%
US	3.2%	4.2%	7.5%	3.5%	0.3%

Source: Smith Travel Research

Arizona Lodging - Demand

2011 % Change over 2010, 2007, 2000, and 2012 thru May

41

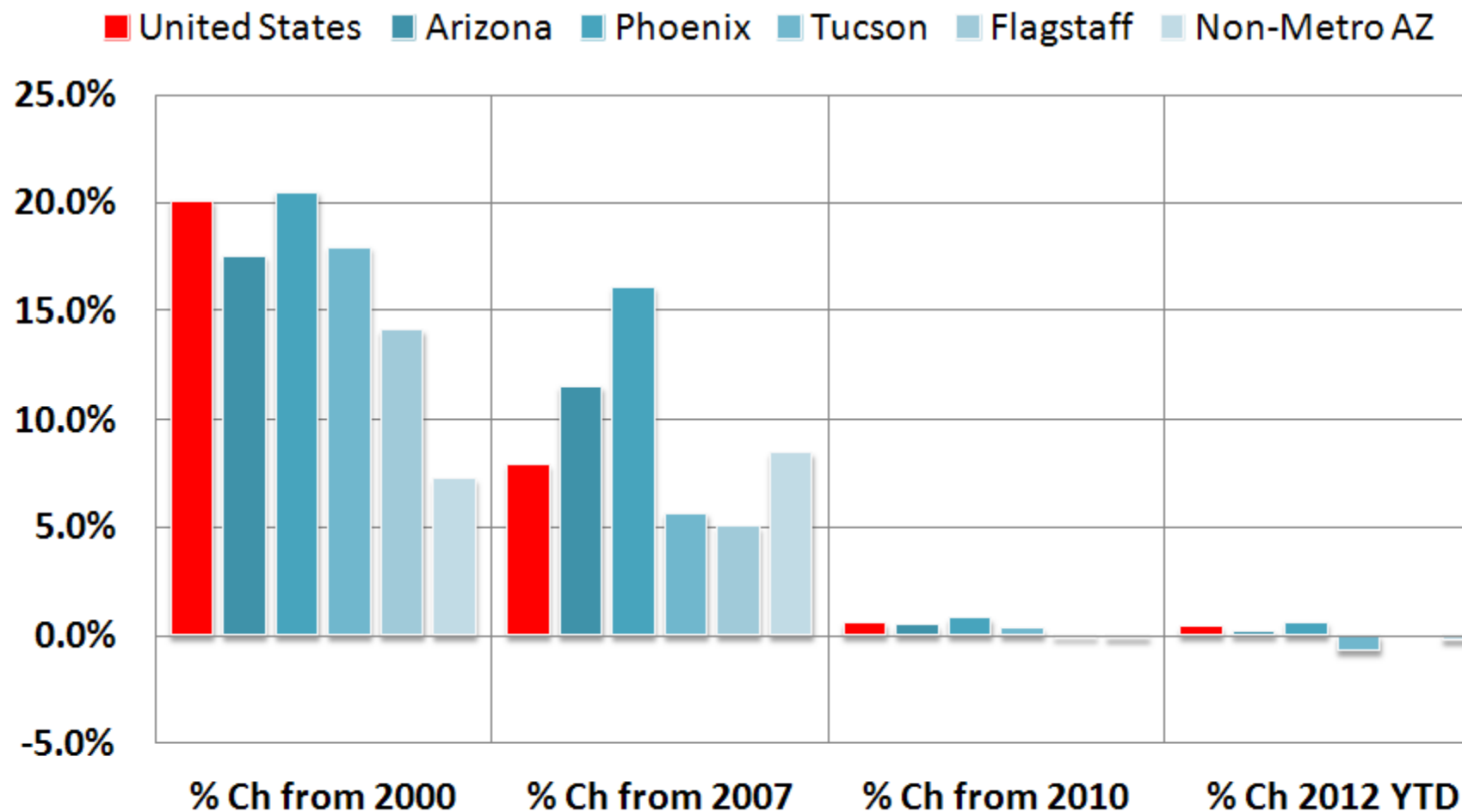


Source: Smith Travel Research

Arizona Lodging - Supply

2011% Change over 2010, 2007, 2000, and 2012 thru May

42



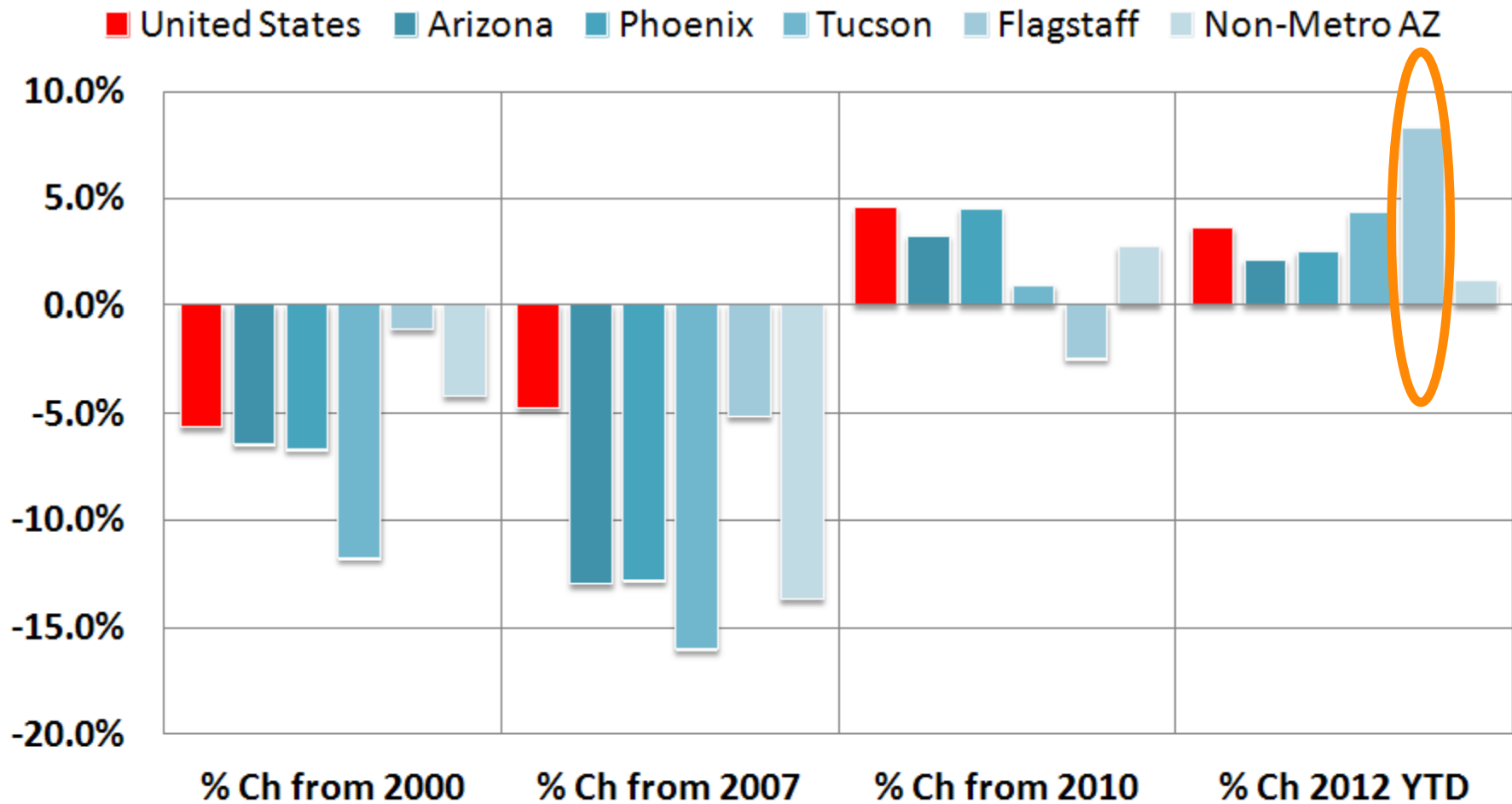
Source: Smith Travel Research



Arizona Lodging - Occupancy

2011% Change over 2010, 2007, 2000, and 2012 thru May

43

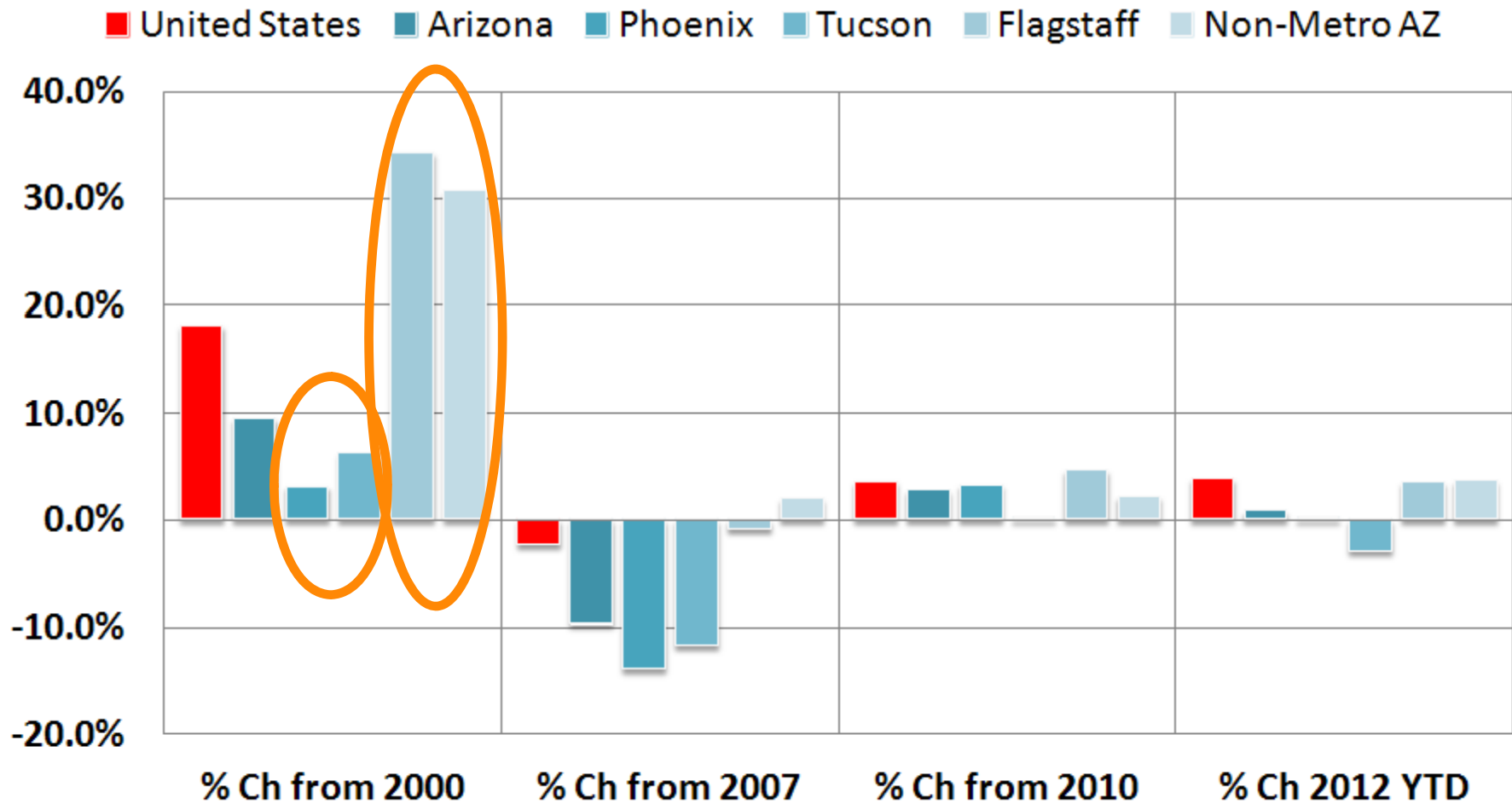


Source: Smith Travel Research

Arizona Lodging – Average Daily Rate

2011% Change over 2010, 2007, 2000, and 2012 thru May

44

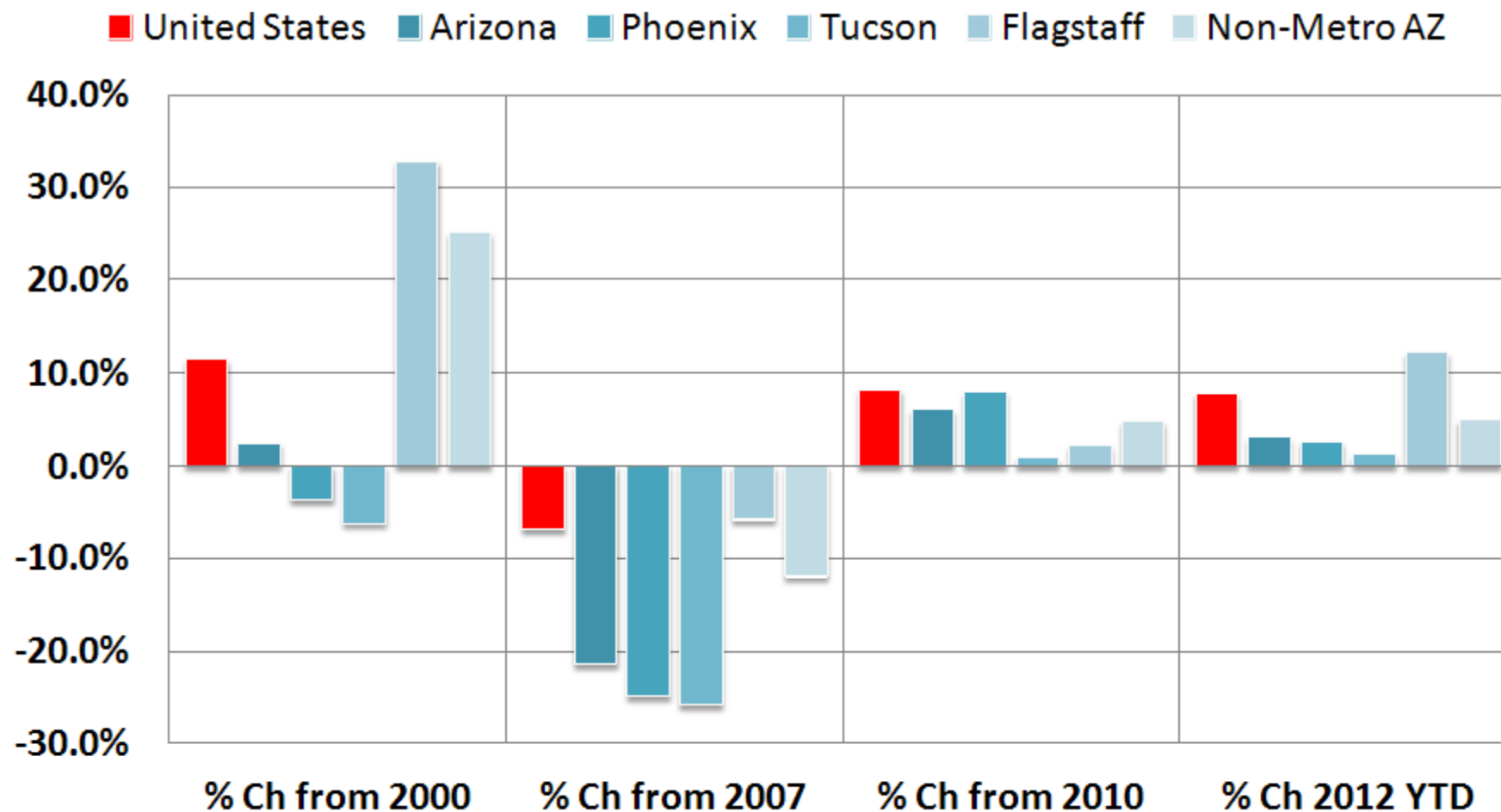


Source: Smith Travel Research

Arizona Lodging – Revenue Per Available Room

2011% Change over 2010, 2007, 2000, and 2012 thru May

45



Source: Smith Travel Research

Website Metrics

arizonaguide.com



PLACES TO VISIT

THINGS TO DO

HOTELS & LODGING

EVENTS CALENDAR

PACKAGES & DEALS

TRAVEL INFORMATION

EXPERIENCE AND SHARE



ESCAPE TO FLAGSTAFF. Journey to a breathtaking land of lush Ponderosa pines, where relaxing outdoor adventures meet eclectic downtown shops. [Learn More »](#)

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THE GRAND CANYON

EXPERIENCE

TRAVEL Deals from AZ businesses
Click a category to see money-saving specials for your vacation

Key Fiscal Year 12 Results

- Overall **visits to arizonaguide.com**  **23.2%** year over year.
- Facebook **fans**  **32%** year over year.
- Twitter **account**  **39%** year over year.
- Web Enhancements including **Experience and Share, American Indian** and **Tourism Partner** sections
- Launched **Spring Training** microsite
- Launched **Summer Travel** microsite

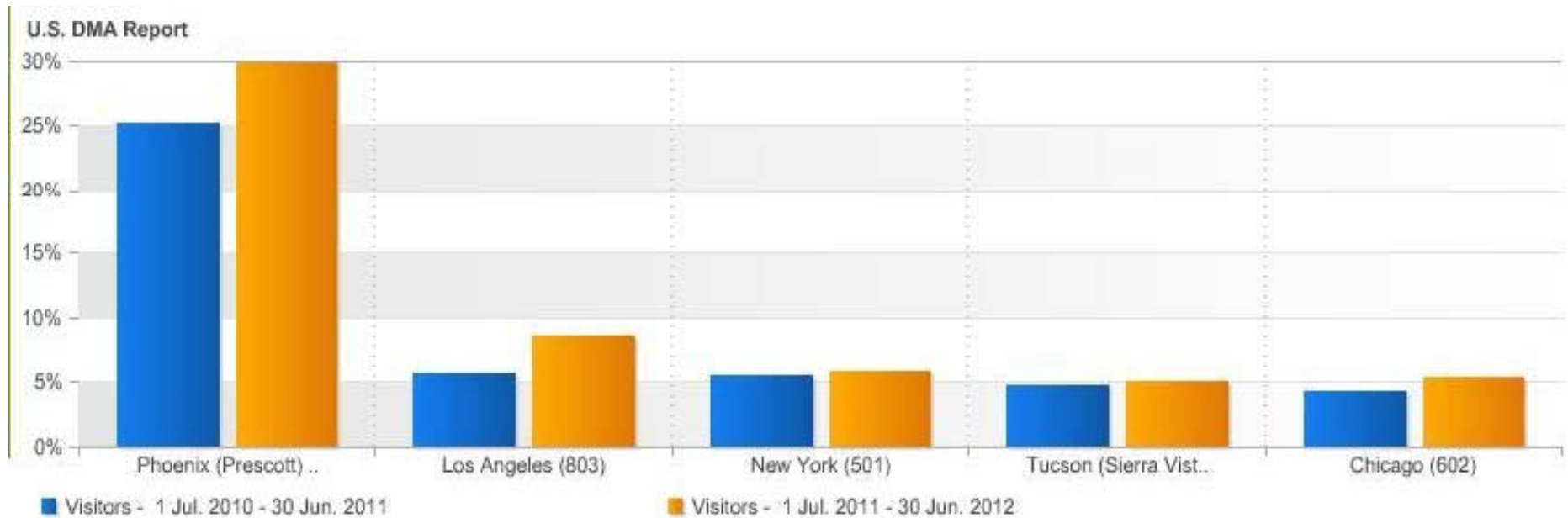
Total Unique visits to arizonaguide.com – 2.0 million

- Percent of return visits – **20%**
- Average Page Views – **4.0**
- Time on Site – **3:28** domestic; **5:01** international
- Requests for Official State Visitor's Guides – **145,330**
- eNewsletter opt-ins – **117,295**
- ePostcards Created – **6,363**

Site Performance – Top US Markets

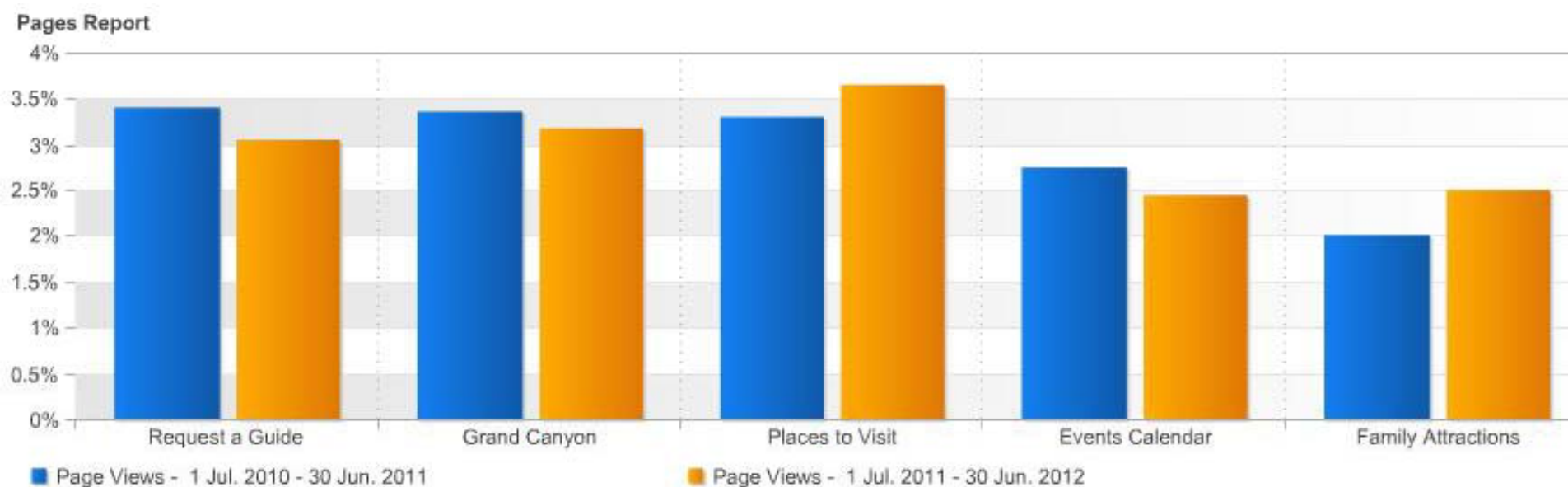
50

Top US Markets to arizonaguide.com





Source: Adobe Digital Marketing Suite, Powered by Omniture

Most Popular Pages (excluding home) to arizonaguide.com:









Target Market Performance

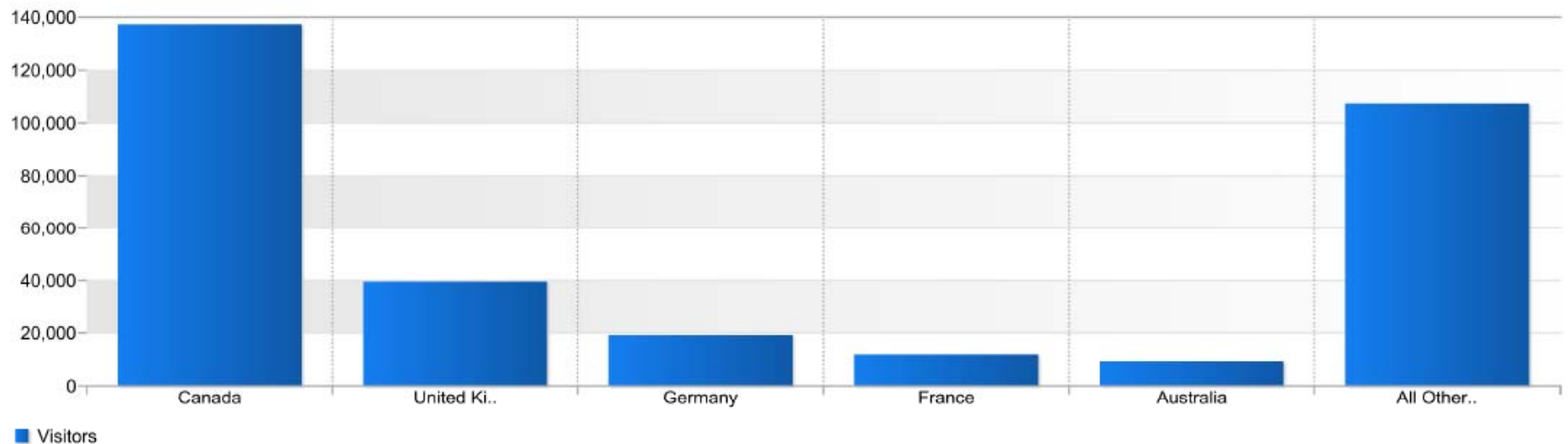
Primary

- Chicago  **8.0%** year over year
- Los Angeles  **23%** year over year

Secondary

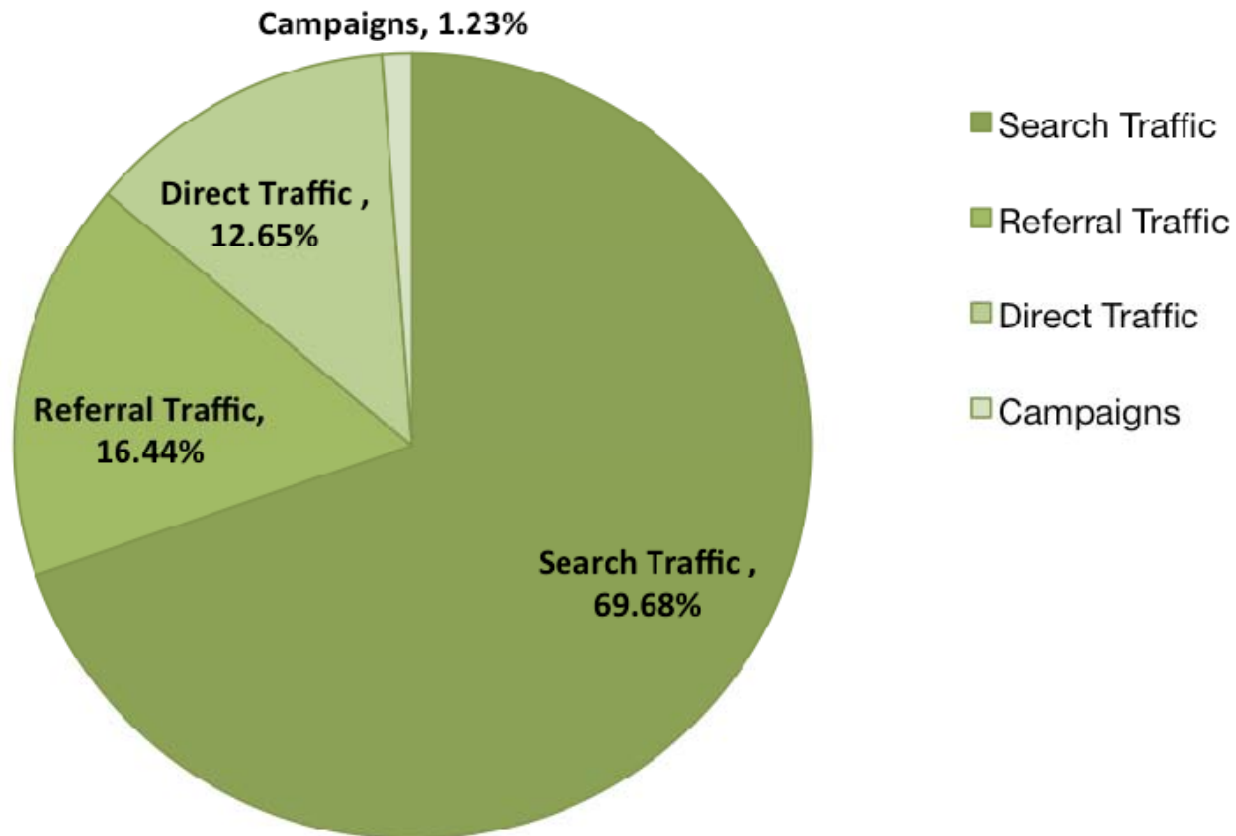
- Denver  **8.0%** year over year
- Minneapolis  **9.0%** year over year
- New York  **8.0%** year over year
- San Diego  **22.0%** year over year
- San Francisco  **11.0%** year over year
- Seattle  **5.0%** year over year

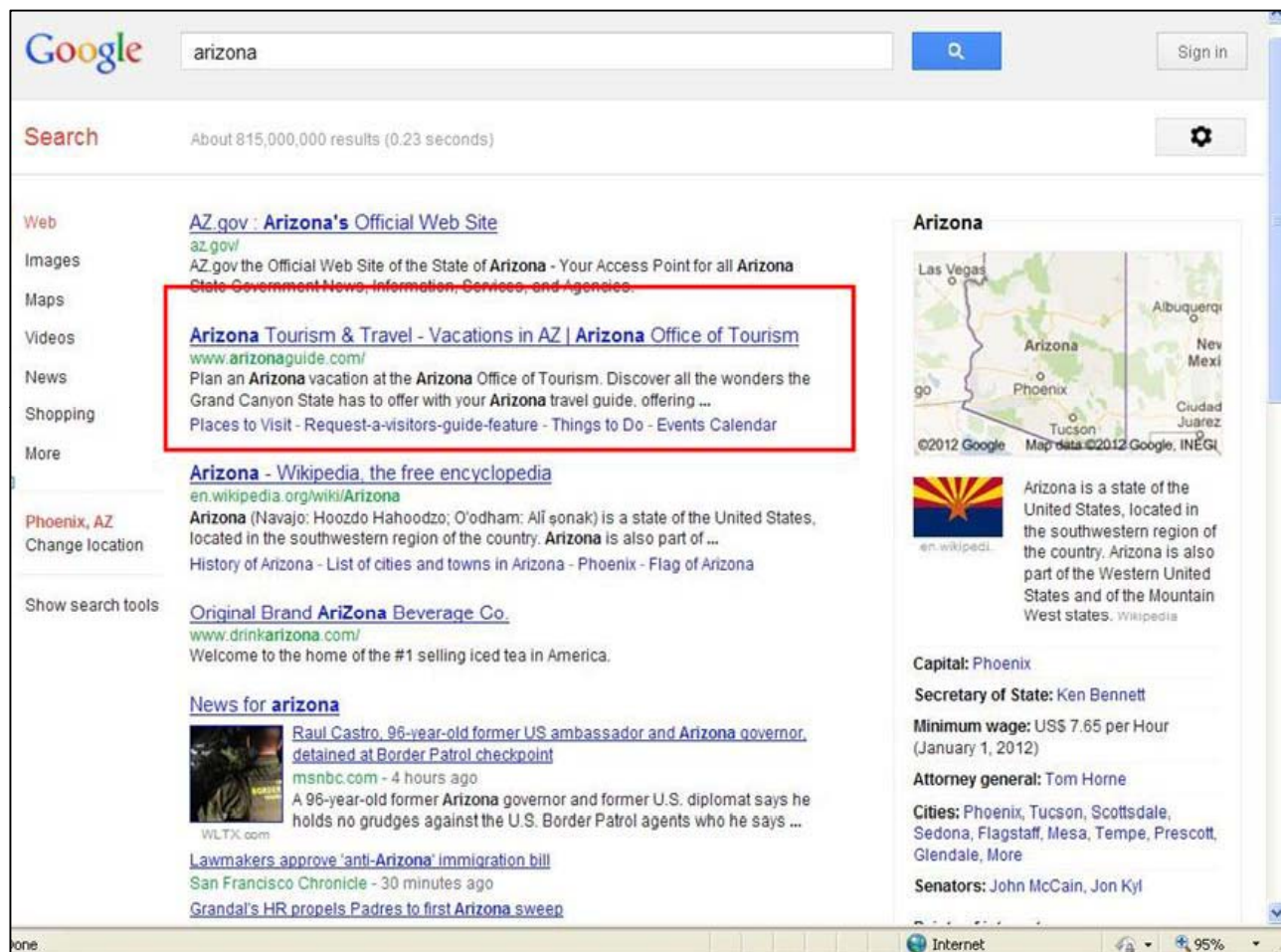
Top International Markets to arizonaguide.com



- Ontario – 42%
- British Columbia – 17.8%
 - Alberta – 13.3%
 - Quebec – 11.8%

FY12 Site Traffic Sources





Top Natural

- Arizona
- Arizona Tourism
- Things to Do in Arizona
- Arizona Travel
- Phoenix, AZ
- Visit Arizona

bing WEB IMAGES VIDEOS MAPS MORE

summer in arizona


123,000,000 RESULTS

Summer in AZ Ad
SummerInAZ.com From natural wonders to luxury resorts. Discover AZ this summer!

Summer in Arizona - 2-1-1 Arizona
www.cir.org/summer
Summer in Arizona is a time to enjoy the great outdoors, but it's also a time to be careful in our extreme heat and our violent monsoon storms. We also need to help ...

Summer Flowers in Arizona | eHow.com
www.ehow.com/list_6540563_summer-flowers-arizona.html
Arizona's dryness and summer heat provide a difficult environment for plants. Most flowers that thrive during Arizona winters cannot handle the high temperatures of ...

Images of summer in arizona
bing.com/images



2-1-1 Arizona - A Service of Community Information and Referral ...
summer.cir.org
2-1-1 Arizona brings people and services together throughout Arizona. If you need help in the Grand Canyon State and you don't know where to turn, turn to us.

Arizona Summer (2004) - IMDb
www.imdb.com/title/tt0346525
User rating: 4.5/10 · Adventure/Family/Comedy · PG - 102 min - 167 ratings
Director: Joey Travolta · Actors: Gemini Barnett, Brent Blair, Jack Christy Blair, Head Counselor, Brooke Burgstahler, Christy, Scott Clifton, Brooke ...

Related searches for summer in arizona
Arizona Summer Movie Arizona Summer Camps
Arizona Summer Grass Arizona Summer Programs

Ads

Overseeded Winter Sod
www.evergreenturf.com
10% Off Online Sod Orders at Evergreen Turf. Buy now.

Arizona HUMMER Prices
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Bargain Prices
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Arizona Summer at Amazon
www.Amazon.com/dvd
Save up to 35% on top DVDs. Qualified orders over \$25 ship free.

Local Jobs - Hiring Now
QuickOnlineJobs.com
Found: 426 jobs near you. Search now!
See your message here

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Top PPC

- Arizona Tourism
- Arizona Attractions
- Sedona, AZ
- Grand Canyon
- Sedona, Arizona
- Arizona Tourist Attractions

Chicago

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hoover dam

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lake havasu az

grand canyon tours

canyon de chelly

grand canyon vacations

grand canyon

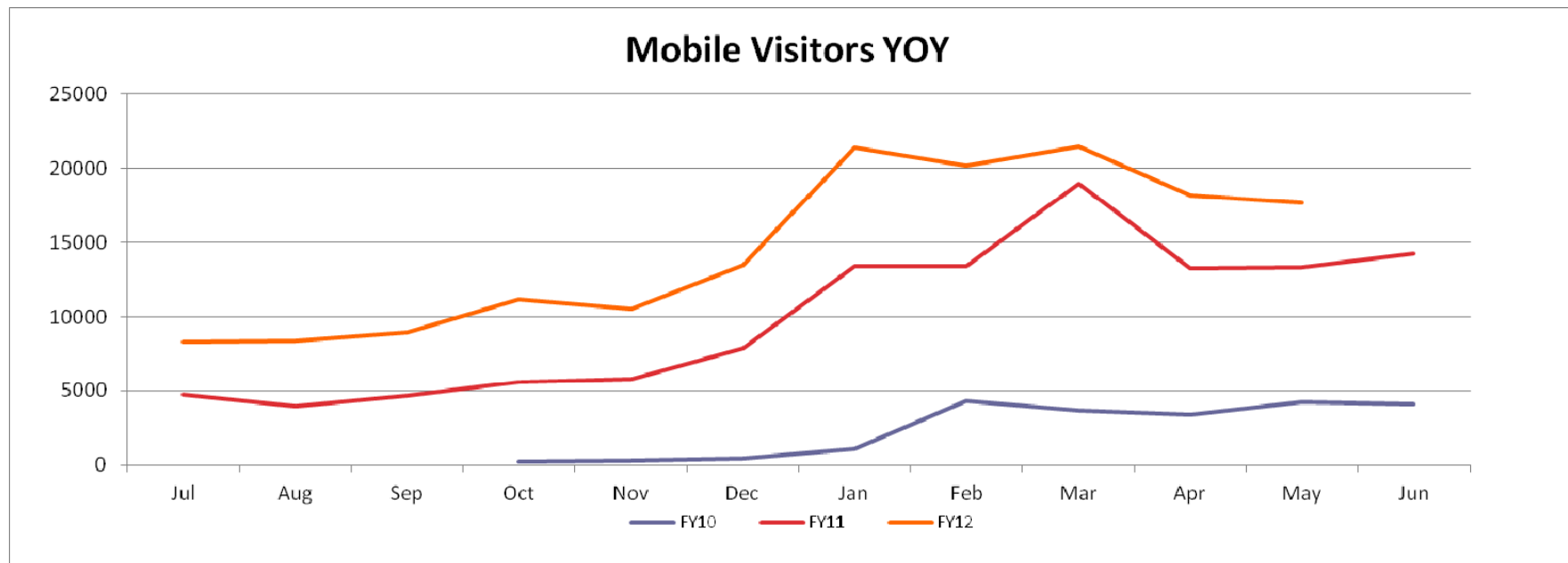
kartchner caverns tour

Site Performance - Mobile

58

Mobile Traffic in FY12 -- 628,201

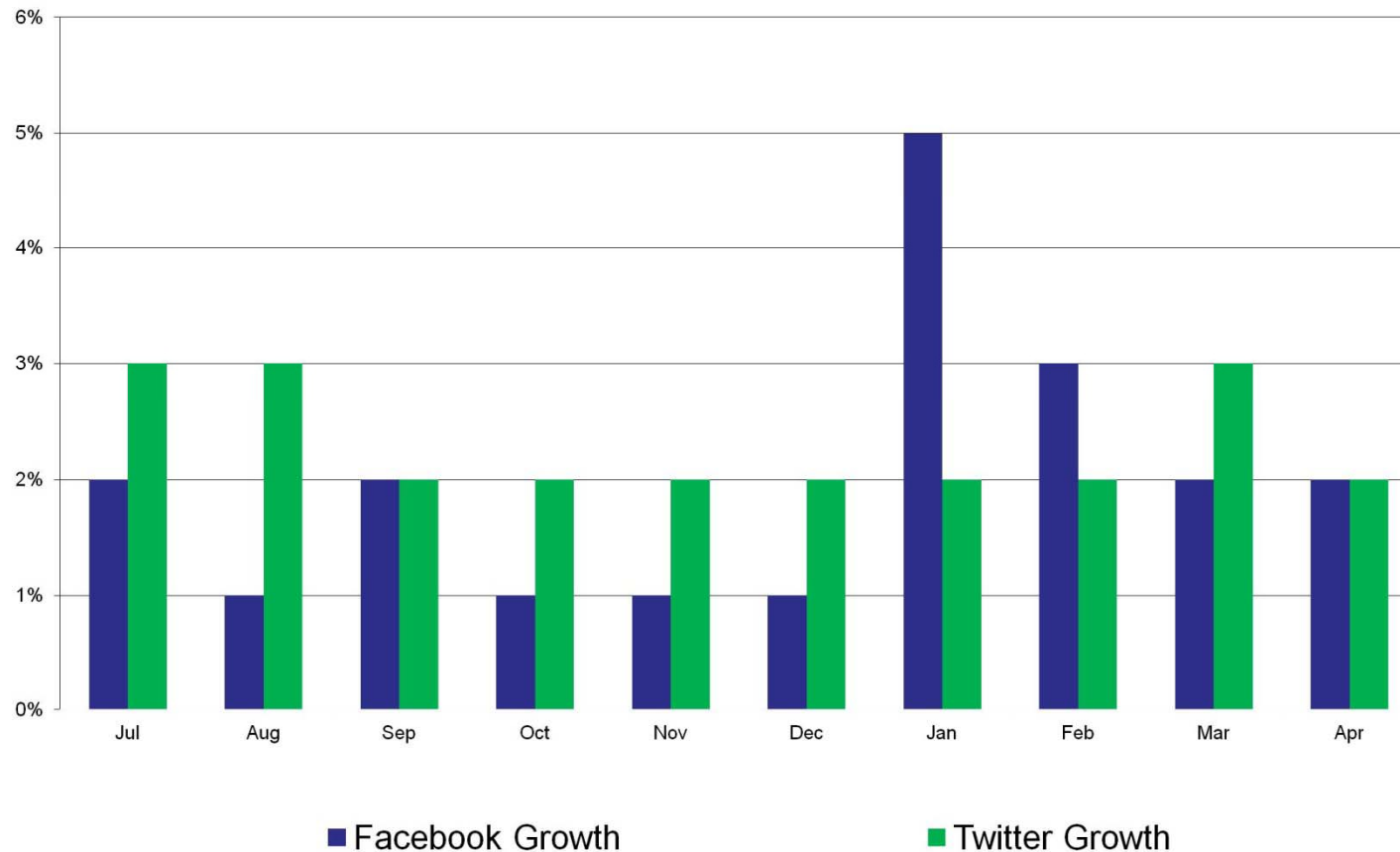
- iPad – 436,869
- iPhone – 53,722
- Android devices – 19,102
- Amazon Kindle Fire – 15,869



Source: Adobe Digital Marketing Suite, Powered by Omniture

Social Media Overview – FY12

59



Facebook Likes – 48,711



Twitter Followers – 15,885

Source: Facebook.com; Twitter.com



Website Improvements

60

Experience & Share

The screenshot displays the 'What's New' section of the Arizona Office of Tourism website. The page has a dark green header with the text 'HOME » EXPERIENCE AND SHARE » WHAT'S NEW' and a red button labeled 'REQUEST A VISITOR'S GUIDE'. The left sidebar contains a 'What's New' menu with links to 'Featured Articles', 'ePostcard', and 'Photo Contest'. Below this is a 'Sign up for Travel News' form with fields for 'first name', 'last name', and 'email address', and a red 'SIGN UP' button. Further down is an 'EVENTS' section with a list of upcoming events: '06.28 125th Annual Prescott Frontier Days & World's Oldest Rodeo', '06.28 9th Annual Lavender Festival', and '06.28 Railhead Shooting Competition'. Each event has a 'more' link. Below the events is a 'Full Event Calendar' link, followed by 'DEALS', 'MY DESTINATIONS', and 'CHAT' links. The main content area is titled 'What's New' and contains three articles. The first article is 'Big Adventures in Small Towns' dated June 18, 2012, with a 'Read the Full Post' link. The second article is 'Arizona's Awe Inspiring Canyons' dated June 12, 2012, with a 'Read the Full Post' link. The third article is 'A Chapel on the Rocks' dated June 8, 2012, with a 'Read the Full Post' link. To the right of the articles is a section for sharing experiences, featuring a stack of postcards and a text prompt: 'Share your own Arizona experience by sending a personalized ePostcard.' Below this is a photo of a hot air balloon over a canyon, with a text prompt: 'A picture's worth 1,000 words - and a whole lot more with our Photo Contest.' At the bottom right, there are social media links for Facebook and Twitter, and a 'Like' button. The footer of the page features the Arizona Office of Tourism logo.

HOME » EXPERIENCE AND SHARE » WHAT'S NEW

REQUEST A VISITOR'S GUIDE

What's New »
Featured Articles
ePostcard
Photo Contest

Sign up for Travel News

first name
last name
email address

SIGN UP

EVENTS

06.28
125th Annual
Prescott Frontier
Days & World's
Oldest Rodeo
[more](#)

06.28
9th Annual
Lavender Festival
[more](#)

06.28
Railhead Shooting
Competition
[more](#)

Full Event Calendar

DEALS

MY DESTINATIONS

CHAT

What's New

What's new in Arizona? Check here to find the latest news, travel tips and events from the locals who know the state the most.

Big Adventures in Small Towns


June 18, 2012
[Read the Full Post](#)

Arizona's Awe Inspiring Canyons

June 12, 2012
[Read the Full Post](#)

A Chapel on the Rocks


June 8, 2012

 Our May photo contest winner describes why Arizona has inspired her to capture more images and why Sedona is so special to her.

[Read the Full Post](#)


Red Rock Panorama: Bell Rock Trail in Sedona

May 14, 2012

 Our April photo contest winner describes a perfect day for photography in Sedona on the Bell Rock Trail.

[Read the Full Post](#)

Share your own Arizona experience by sending a personalized ePostcard.

 A picture's worth 1,000 words - and a whole lot more with our Photo Contest.

Arizona - The Official Grand Canyon State on Facebook

Like You like this.

Arizona - The Official Grand Canyon State

What's

ARIZONA OFFICE OF TOURISM

American Indian

[Northern Arizona](#)
[North Central Arizona](#)
[Phoenix & Central Arizona](#)
[Tucson & Southern Arizona](#)
[Arizona's West Coast](#)
[Grand Canyon](#)
[Arizona Parks & Monuments](#)
American Indian Tribes

[Sign up for Travel News](#)

[SIGN UP](#)

EVENTS
 06.28
 125th Annual Prescott Frontier Days & World's Oldest Rodeo
[more](#)
 06.28
 9th Annual Lavender Festival
[more](#)
 06.28
 Railhead Shooting Competition
[more](#)
[Full Event Calendar](#)
[DEALS](#) +
[MY DESTINATIONS](#)
[CHAT](#)

aces-to-visit/american-indian-tribes#northern

American Indian Tribes

Vast, beautiful terrain, ancient architectural ruins and the rich traditions of the American Indian landscape, where the rich traditions of five distinct regions containing dozens of tribes with American Indian reservations are full of adventure.

Northern Arizona

Amongst tree-lined forests and sweeping desert vistas lie the welcoming lands of Arizona's most expansive tribes.

TRIBES
[Havasupai](#)
[Hopi](#)
[Hualapai](#)
[Kaibab-Paiute](#)
[Navajo](#)
[San Juan](#)
[Southern Paiute](#)
[White Mtn. Apache](#)
[Zuni Pueblo](#)

Arizona's American Indian Lands Map

Find your way to and around all of Arizona's American Indian lands. Download

Website Improvements

62

DiscoverAZSpringTraining.com

Visit **ARIZONA** for
SPRING TRAINING

Enjoy all the season has to offer.

Local Picks

» Make it a winning vacation with this list of great places to shop, play, eat and relax.

Road Trips

» Get into Arizona's outfield for red rocks, sparkling lakes, canyons and more.

» See where to stay, eat and play on your team's turf.

- » GLENDALE / GOODYEAR
- » MESA
- » PEORIA / SURPRISE
- » PHOENIX / TEMPE
- » SCOTTSDALE

GREATER PHOENIX

PEORIA / SURPRISE

- Surprise Stadium
 - Rangers
 - Royals
- Peoria Sports Complex
 - Mariners
 - Padres

SCOTTSDALE

- Salt River Fields
 - Diamondbacks
 - Rockies
- Scottsdale Stadium
 - Giants

PHOENIX / TEMPE

- Camelback Ranch
 - Dodgers
 - White Sox
- Maryvale Stadium
 - Brewers
- Goodyear Ballpark
 - Indians
 - Reds
- Phoenix Municipal
 - Athletics
- Tempe Diablo Stadium
 - Angels

MESA

- Hohokam Park
 - Cubs

Website Improvements

63

SummerinAZ.com



Outlook/Trends

Outlook/Trends

“The Economy isn’t careening into a ditch. It’s just stuck firmly into the slow lane”

-USA today

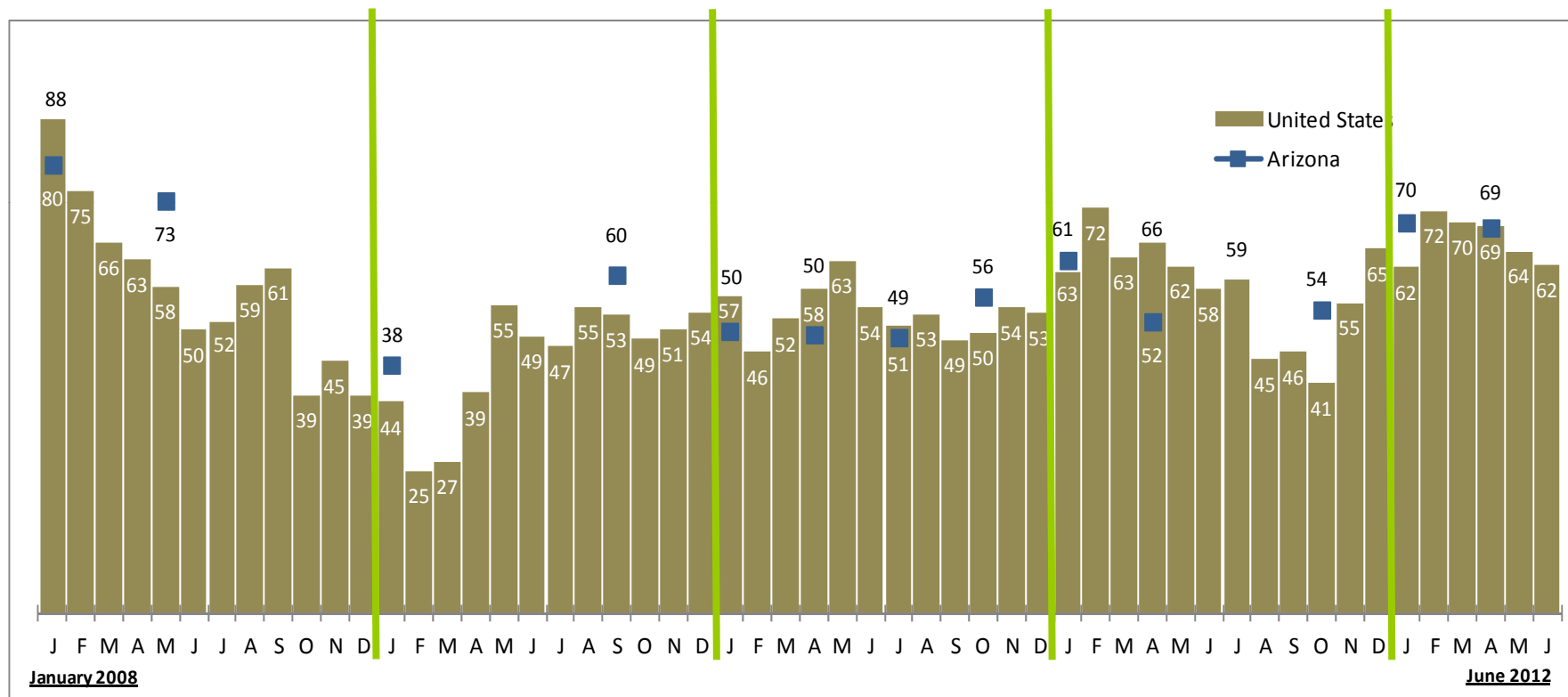


Consumer Confidence – U.S & Arizona

Index by Month: January 2008 - June 2012

67

As a result, consumer confidence is stagnant.....

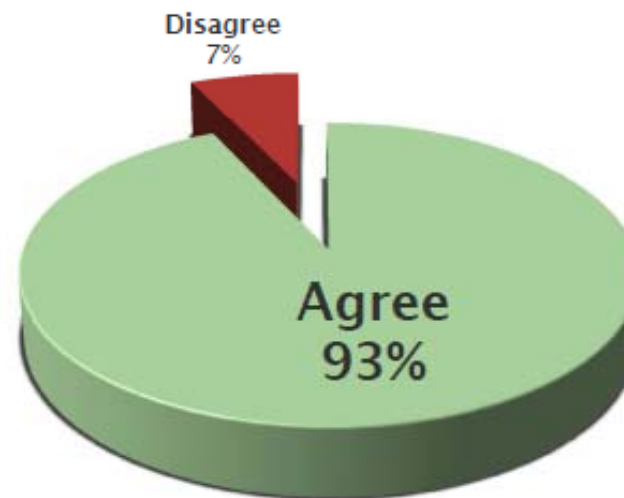


Source: U.S. Conference Board, Behavior Research Center – Rocky Mountain Poll

People need a Vacation!

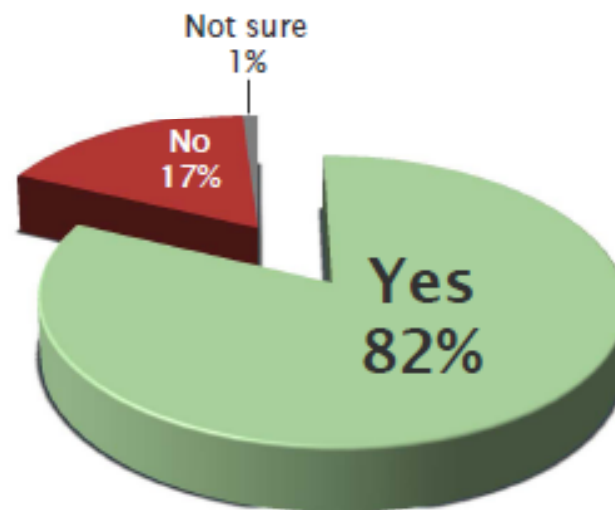
- Over nine in ten (93%) report feeling *happier* after taking a vacation.

"I feel happier after taking a vacation."



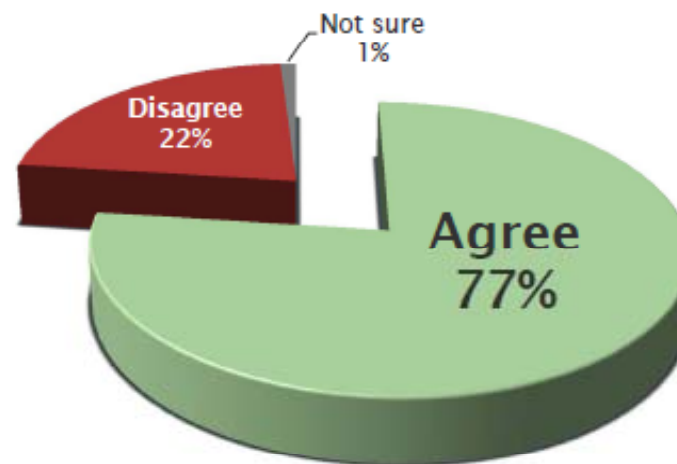
- 82% report that **some of their happiest moments come from experiences they have while on vacation.**

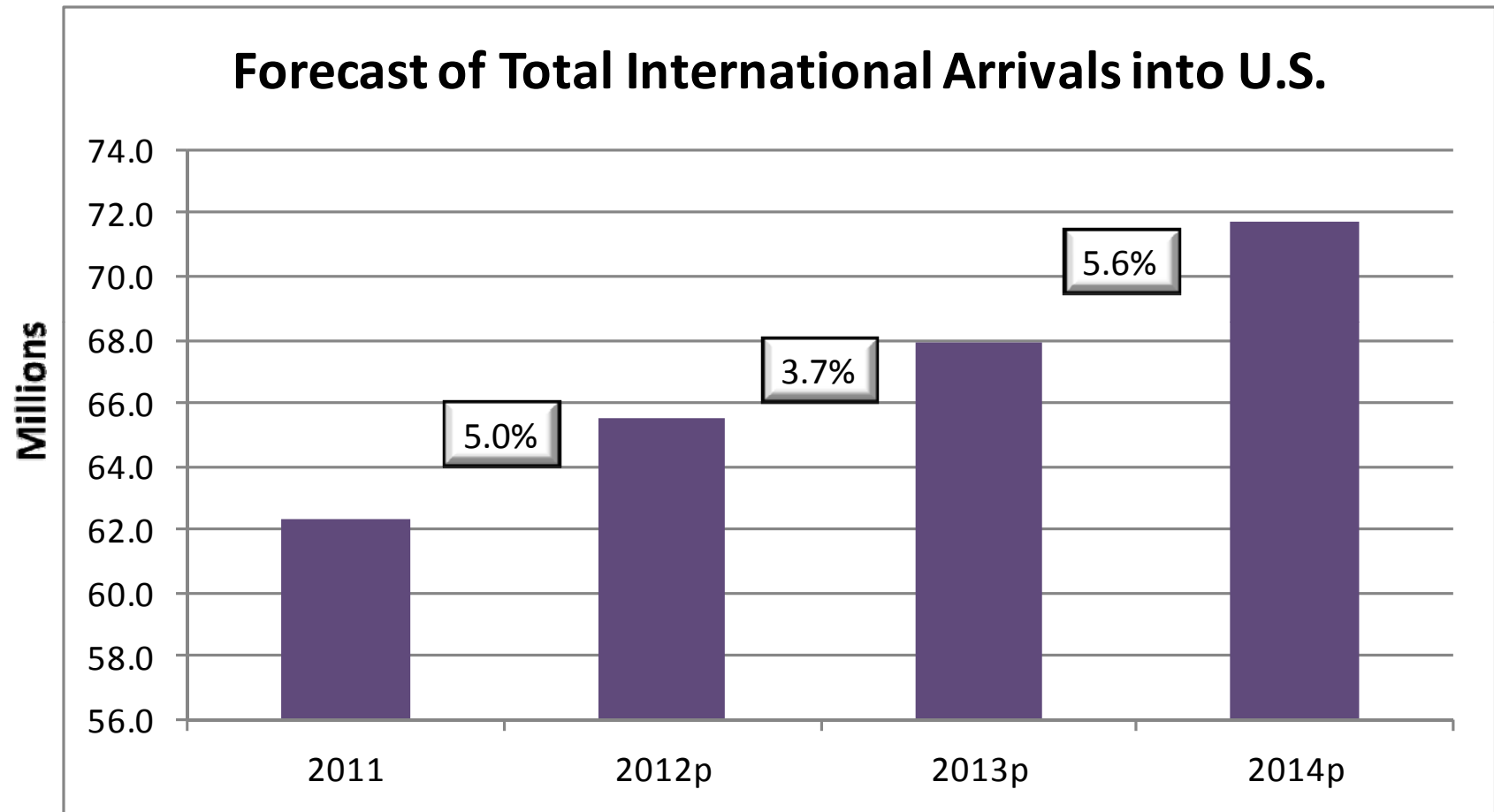
Do some of your
happiest
moments come
from experiences
you have while
on vacation?



- Over three-quarters (77%) believe that **their health improves** after a vacation.

"I feel healthier after taking a vacation"





Source: U.S. Travel Association, Office of Travel & Tourism Industries - U.S. Department of Commerce



Brand USA

DiscoverAmerica.com

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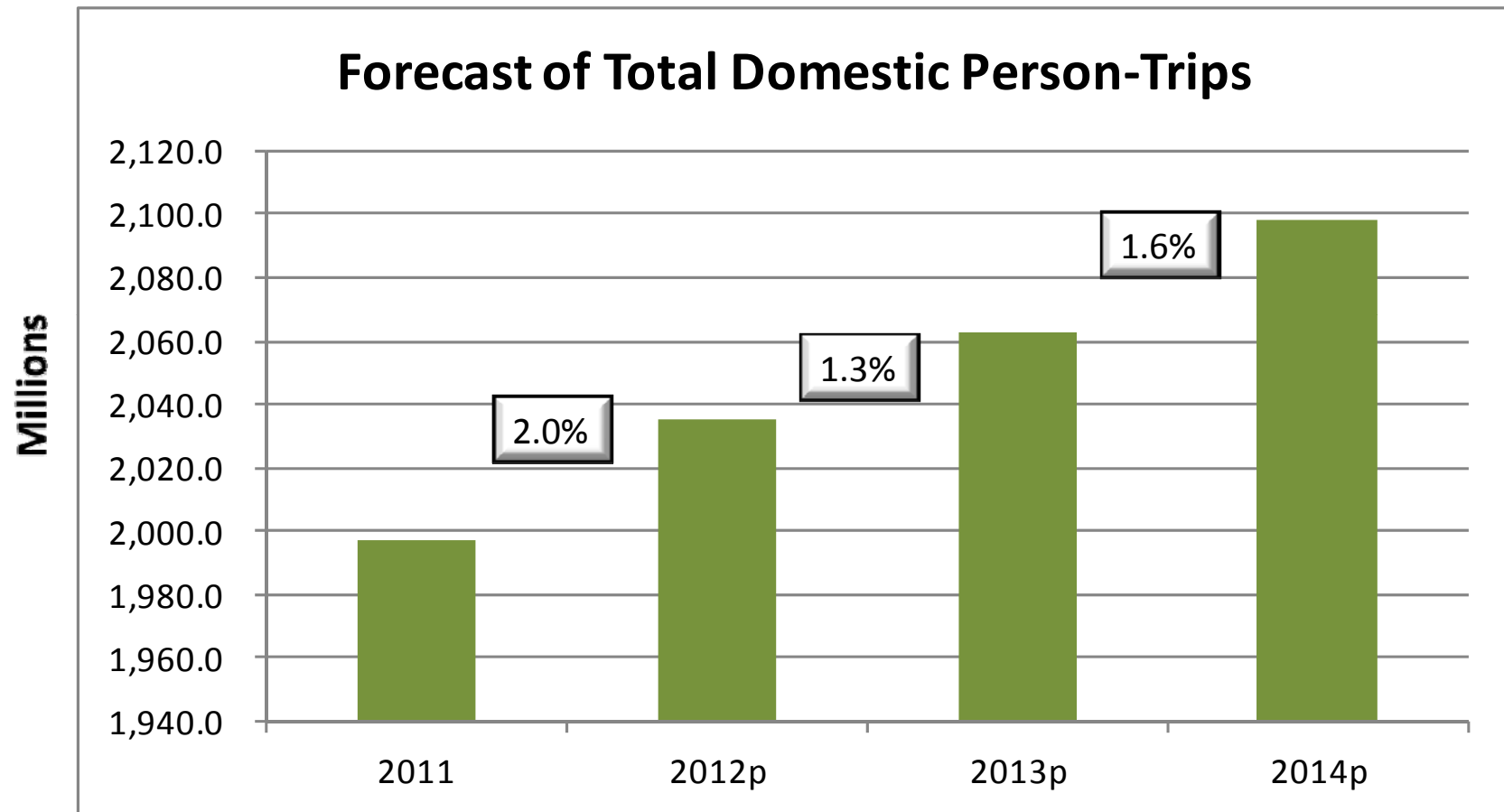
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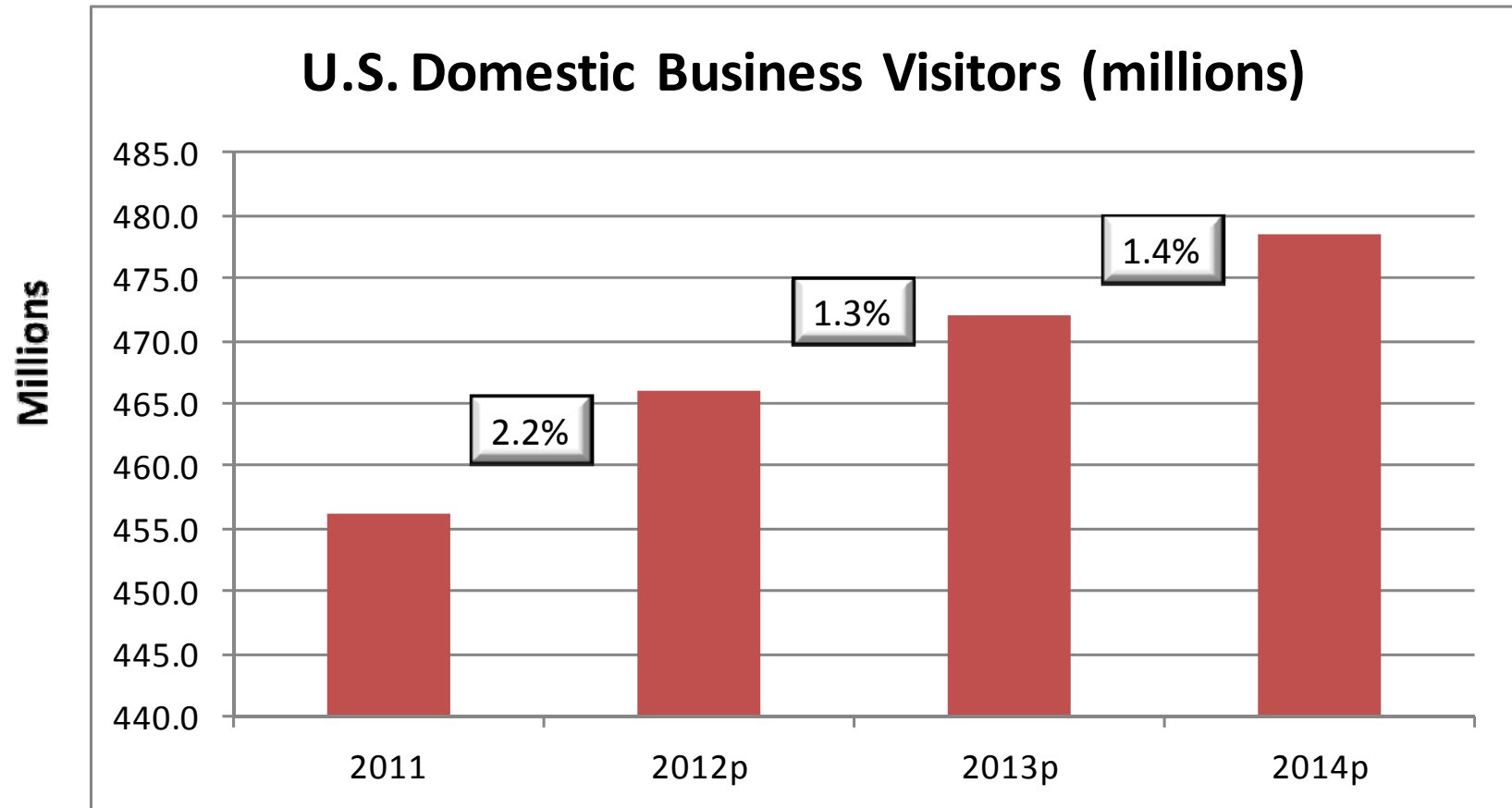


Welcome to Brand USA, a public private partnership with the mission of promoting increased international travel to the United States.

Photography by Carol Highsmith



Source: U.S. Travel Association

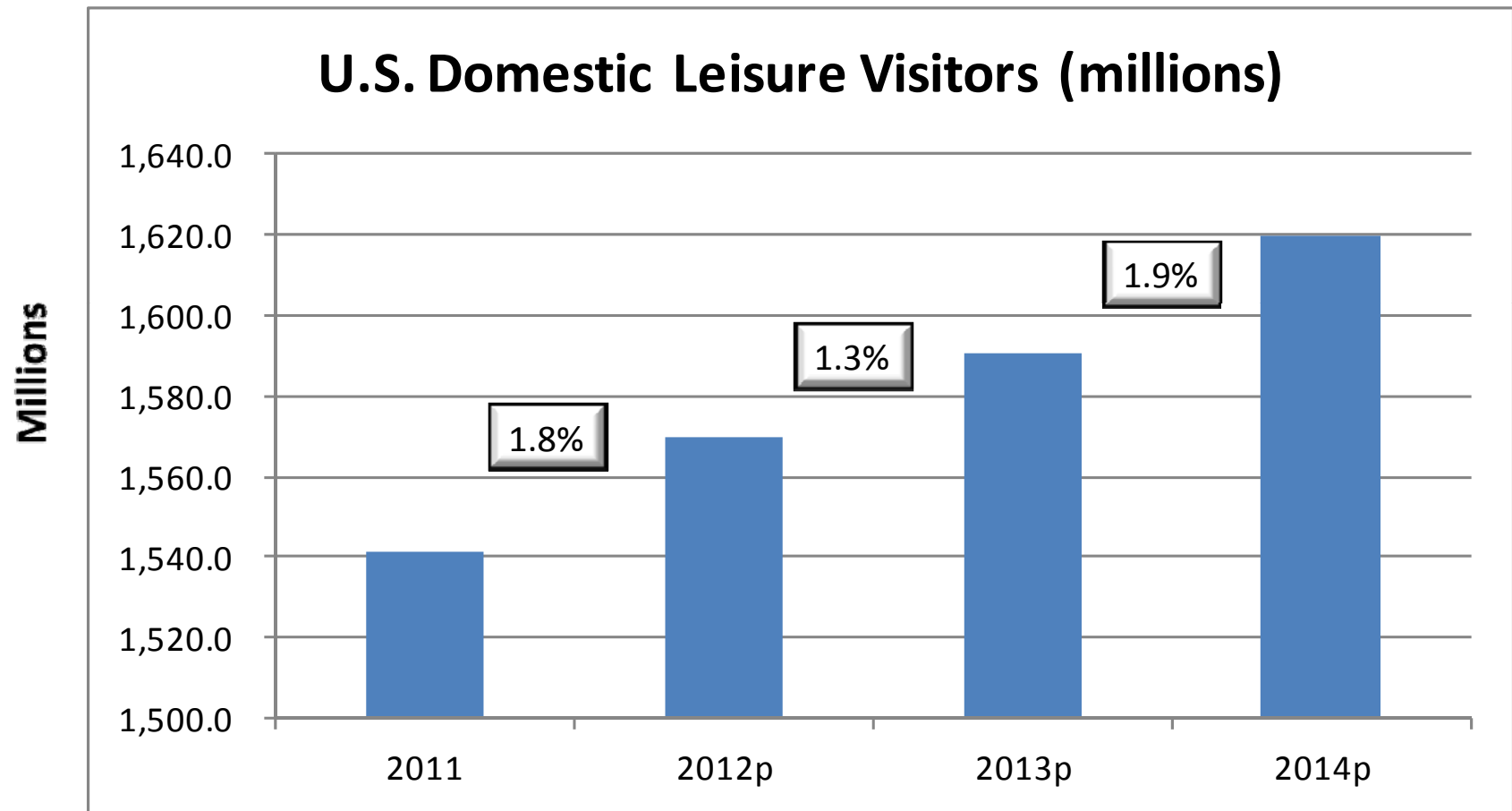


Source: U.S. Travel Association

Corporate Meetings Travel Gross Bookings, 2008-2012 (\$B)

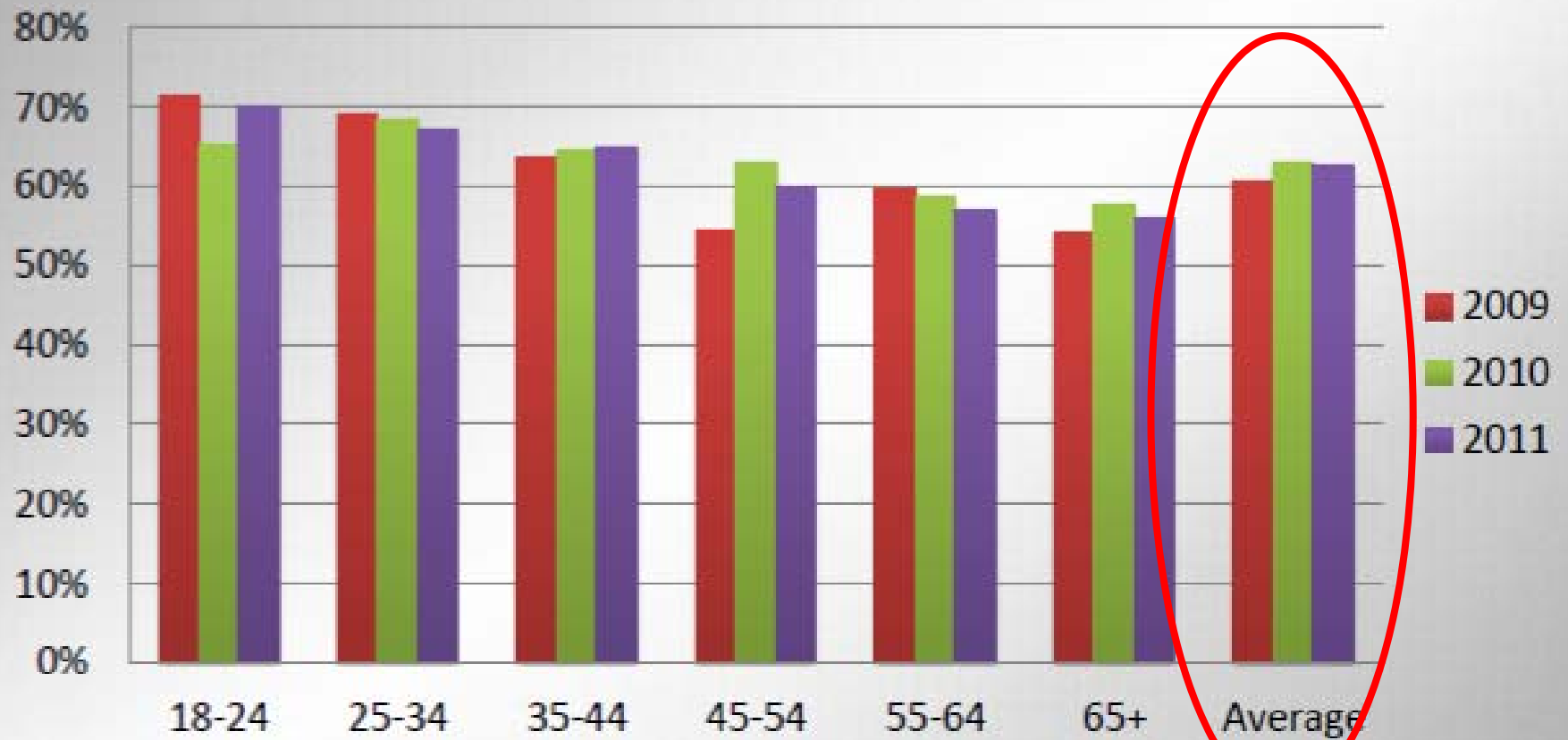


Source: PhoCusWright's Groups and Meetings: Driving Success in Business Travel's Most Complex Segment, 2010

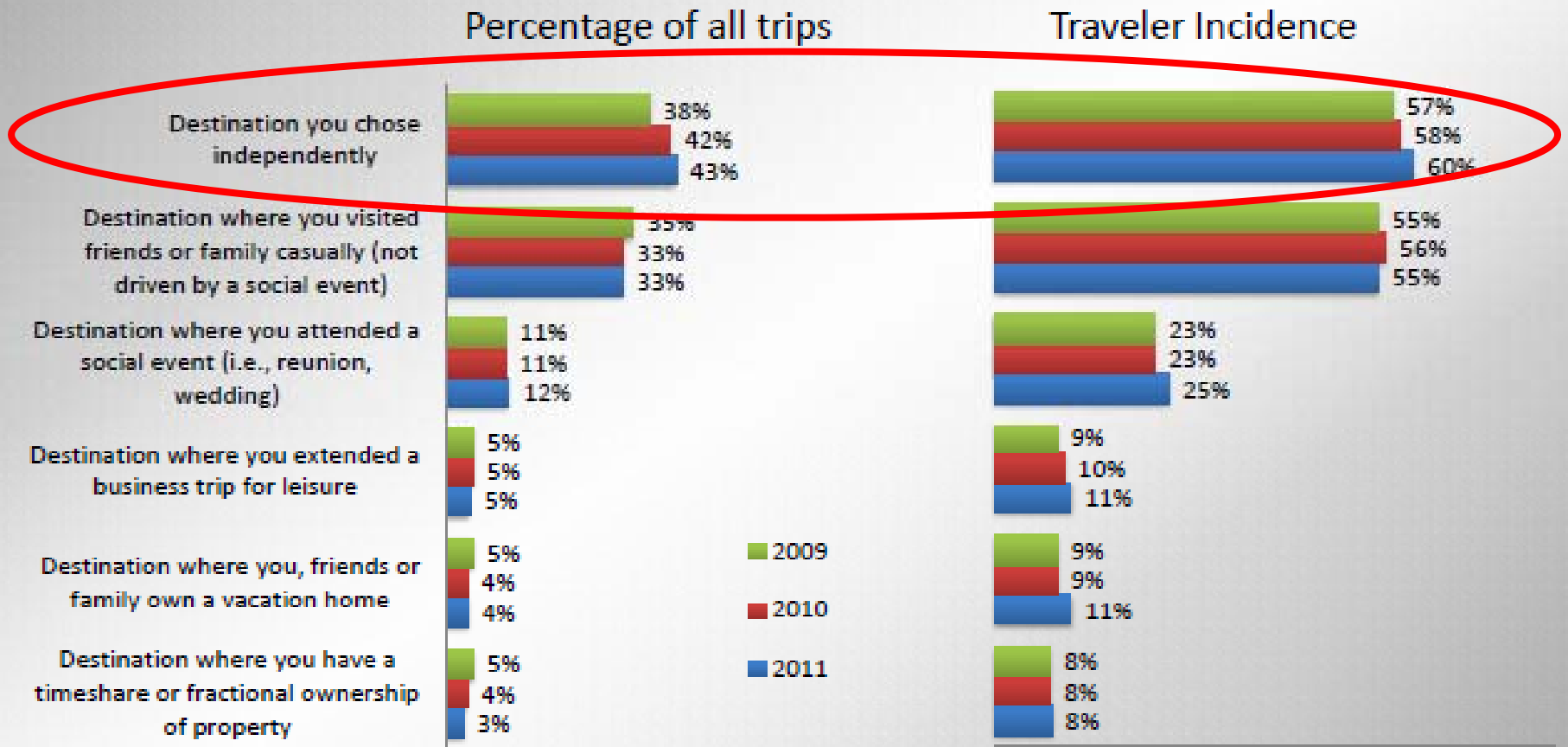


Source: U.S. Travel Association

Incidence of Travel



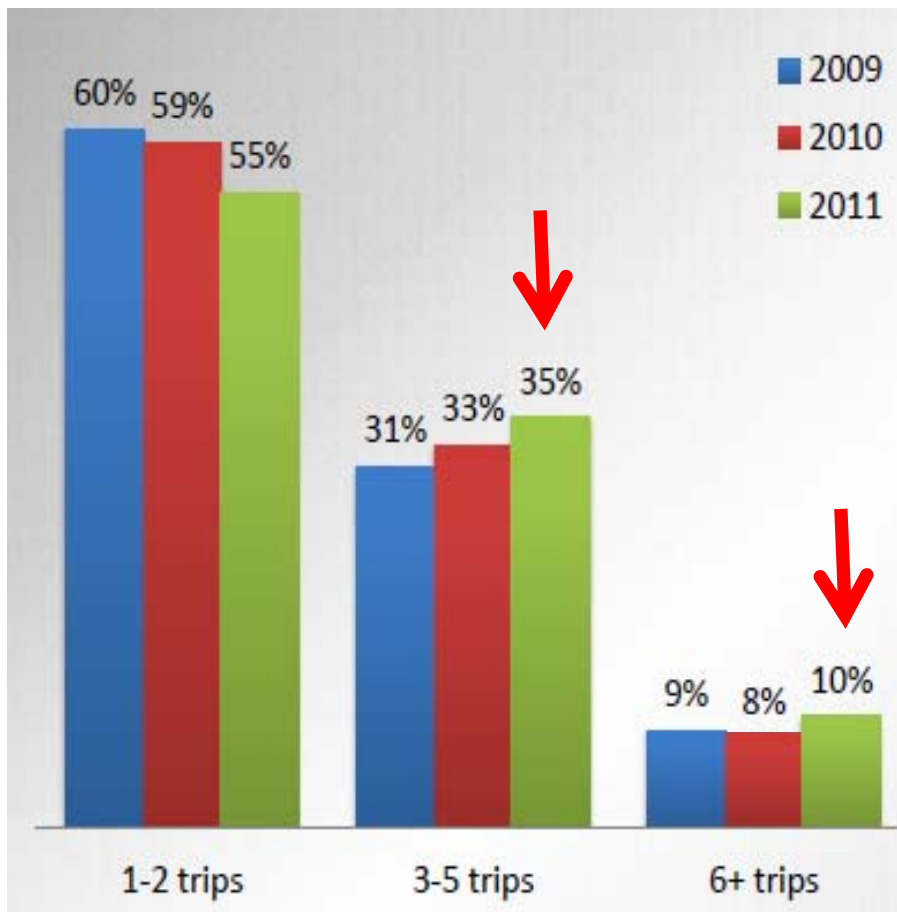
Destination Selection Categories



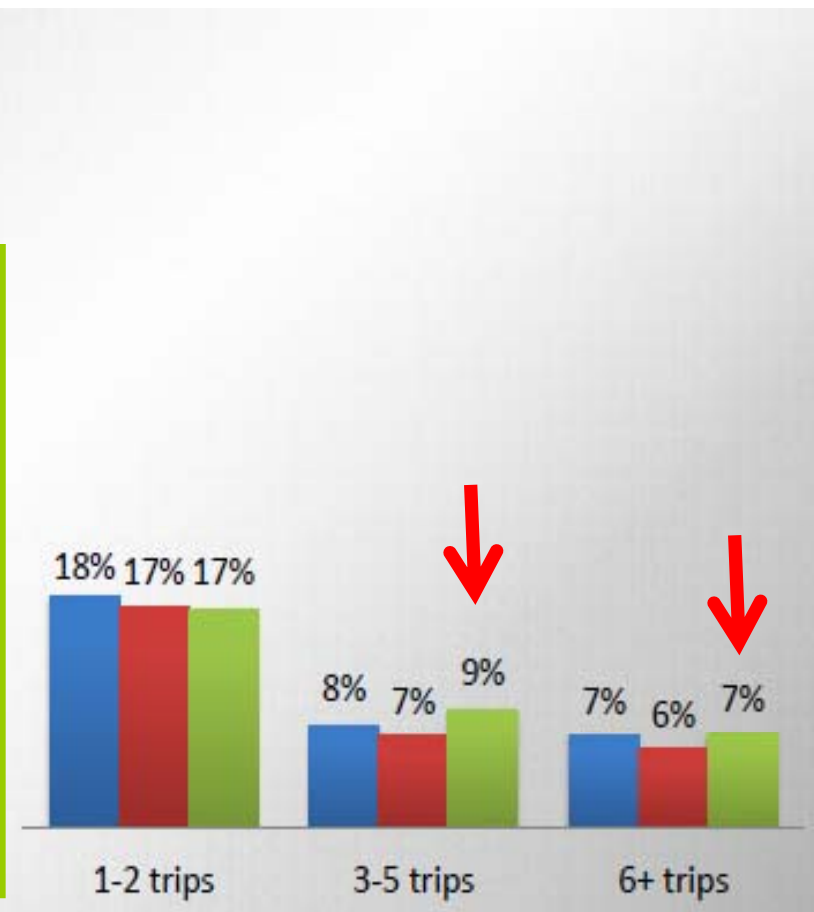
U.S. Consumer Travel Trends – Frequency of Travel

80

Leisure



Business



Source: PhoCusWright's Consumer Travel Report Fourth Edition

Annual Household Travel Spend

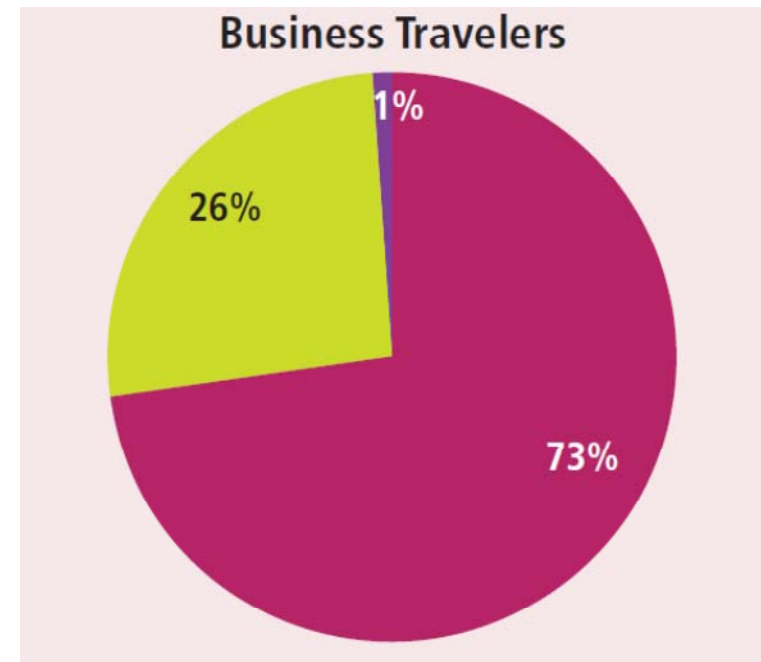
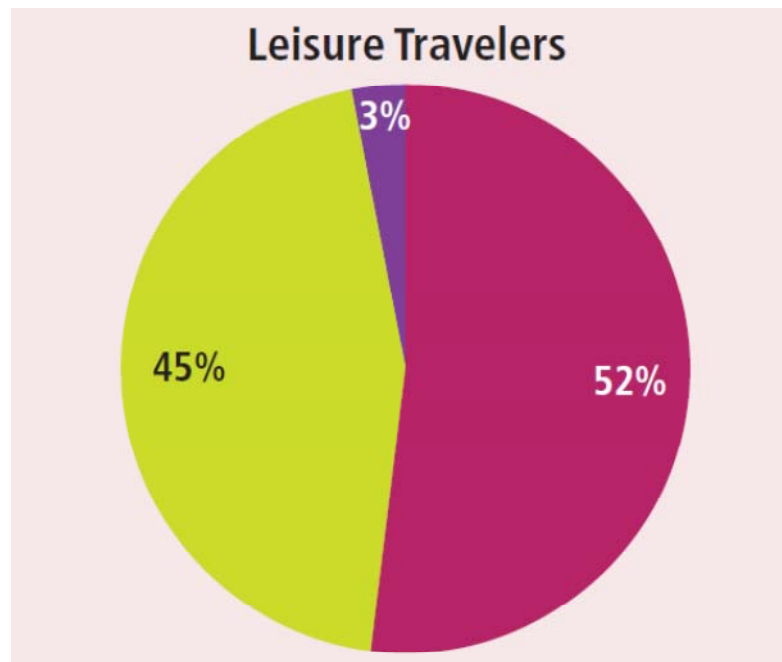




**IF FACEBOOK WERE A COUNTRY,
IT WOULD BE THE 4TH LARGEST
IN THE WORLD.**



Smartphone usage:



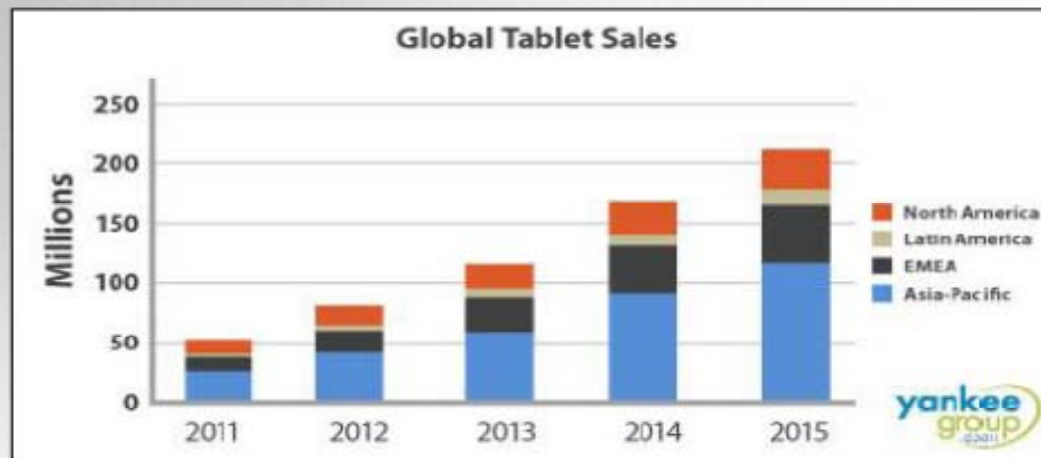
■ Smartphone ■ Feature phone only ■ No mobile phone

Smartphone Maturity by Market



Source: Mobile Hits the Mainstream: Understanding the Evolving Mobile Travel Opportunity Technology and Industry Trends , PhoCusWright Inc

We Are at the Beginning of the Tablet Revolution



Global tablet sales will reach 250 million worldwide by 2015, with major growth in Asia Pacific and EMEA

- Tablets are about high consumption and immersive environments
- Travel companies must develop a specific strategy for the emerging tablet market, as frequent travelers are early adopters of these devices

Source: Yankee Group

Key Findings – Travel Segments

- Hoteliers are seeing a significant percentage (30-60%) of mobile bookings within 24 hours of the stay. This represents both new consumer behavior and channel shift



- OTAs must extend services beyond booking throughout the trip life cycle

- Tourism organizations need to focus on capturing the extended planning cycle enabled by mobile technology



- Airlines can use mobile technology for more direct distribution and continuous customer engagement



- A majority of corporate travel managers have not implemented a complete mobile strategy, often allowing the traveler to choose which applications to use

Thank you!

Questions???

To learn more about AOT, visit www.azot.gov

To download this presentation, go to www.azot.gov, click on Research & Statistics, then go to Arizona Research Reports & Presentation and you will find the link under the presentation tab